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the state of food and agriculture 1975

FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

SPECIAL CHAPTERS

In addition to the usual review of the recent world food and agriculture situation, each issue of this report from 1957 has included one or more special studies of problems of longer term interest. Special chapters in earlier issues have covered the following subjects:

1957
Factors influencing the trend of food consumption
Postwar changes in some institutional factors affecting agriculture

1958
Food and agricultural developments in Africa south of the Sahara
The growth of forest industries and their impact on the world's forests

1959
Agricultural incomes and levels of living in countries at different stages of economic development
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1968
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1969
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Modernization of institutions to promote development

1970
Agriculture at the threshold of the Second Development Decade

1971
Water pollution and its effects on living aquatic resources and fisheries

1972
Education and training for development
Accelerating agricultural research in the developing countries

1973
Agricultural employment in developing countries

1974
Population, food supply and agricultural development

THE STATE OF FOOD AND AGRICULTURE 1975

the state of food and agriculture 1975

WORLD REVIEW

THE SECOND UNITED NATIONS DEVELOPMENT DECADE:
MID-TERM REVIEW AND APPRAISAL

FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

The statistical material in this publication has been prepared from the information available to FAO up to November 1975.

The designations employed and the presentation of the material in this publication do not imply the expression of any opinion whatsoever on the part of the Food and Agriculture Organization of the United Nations concerning the legal status of any country, territory, city or area, or of its authorities, or concerning the delimitation of its frontiers or boundaries. In some tables, the designation "developed" and "developing" economies is intended for statistical convenience and does not necessarily express a judgement about the stage reached by a particular country or area in the development process.

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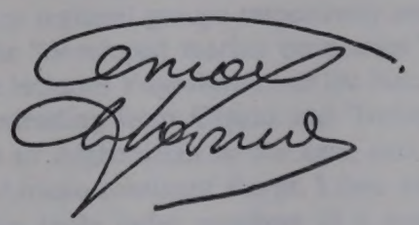
FOREWORD

This issue of The state of food and agriculture *concentrates mainly on FAO's mid-term review and appraisal of progress in the food and agricultural sector during the Second United Nations Development Decade (DD2) covering the 1970s. This is a revised version of the document submitted in the course of 1975, as the Organization's contribution to the overall review and appraisal of DD2 carried out by the United Nations system. While its main emphasis is on the analysis of information available for the first four years of DD2, it also reviews the longer term trends since the start of the First United Nations Development Decade.*

The assessment gives no cause for complacency or even for satisfaction. In some instances, progress has been made during DD2. However, it has generally slowed down in comparison with the previous decade and in many crucial aspects the situation has deteriorated. Even with the subsequent good harvests in most developing countries in 1975, food and agricultural production in the developing world has increased much more slowly than during DD1, and has fallen behind the growth of population. The food imports of the developing countries have risen much faster than their agricultural exports, and many of them face grave difficulties in financing essential imports of food and fertilizers. Stocks of basic cereals have fallen well below minimum safety levels. The nutrition situation has deteriorated further in many countries. Although there has been increased recognition of the need for far-reaching changes in the structure of rural institutions and services, there is little evidence of concrete progress except in isolated cases. International development assistance for agriculture has recently shown an encouraging expansion, yet it remains far below the levels necessary for the attainment of the DD2 agricultural production target. Food aid has recovered, but is has not yet reached the minimum target called for by the World Food Conference.

Such is the situation at the mid-point of the Second United Nations Development Decade. It is a context in which, as a newly elected Director-General of FAO, I undertook a review of the policies, programmes and structures of the Organization in response to Conference Resolution 16/75. It also defines the challenges which face Member Nations and FAO in overcoming the disappointments of the agricultural sector and in enabling it to respond to the aspirations of governments and the peoples.



EDOUARD SAOUMA
DIRECTOR-GENERAL

EXPLANATORY NOTE

The following symbols are used in statistical tables:

— none or negligible

... not available

1971/72 signifies a crop, marketing or fiscal year running from one calendar year to the next; 1971-72 signifies the average for two calendar years.

Figures in statistical tables may not add up because of rounding. Percent changes from one year to another have been calculated from unrounded figures. Unless otherwise indicated, the metric system is used throughout.

Production index numbers [1]

The indices of agricultural production are calculated by applying regional weights, based on 1961-65 farm price relationships, to the production figures, which are adjusted to allow for quantities used for feed and seed. The indices for food products exclude tobacco, inedible oilseeds, animal and vegetable fibres, and rubber. They are on a calendar year basis and are therefore not comparable with the indices for crop years published in the 1966 and prior issues of this report.

For fishery production, quantities are weighted by the average unit values of fishermen's landings in 1961-65. For forest production, roundwood production is weighted by 1961-65 prices.

Trade index numbers [2]

In calculating trade index numbers of agricultural products for the present issue, both commodity and country coverages include all the commodities and countries shown in the 1974 issue of the FAO *Trade yearbook*.

All indices are calculated independently for the value, volume and unit value of exports and of imports.

Value indices represent the changes in the current values of exports (f.o.b.) and imports (c.i.f.), all expressed in U.S. dollars. If some countries report imports valued at f.o.b., these are adjusted to approximate c.i.f. values. This method of estimation shows an error whenever the trend of insurance and freight diverges from the commodity unit values at export level.

Volume and unit value indices represent the changes in the price-weighted sum of quantities and of the quantity-weighted values of products traded between countries. The weights are respectively the price and quantity averages of 1961-65, which is the base reference period used for all the index number series currently computed by FAO. The Laspeyres formulas were used in the construction of the index numbers.

Regional coverage

The regional grouping used in this publication follows the recently adopted "FAO country classification for statistical purposes." The coverage of the groupings is in most cases self-explanatory. The term "developed countries" is used to cover both the developed market economies and the centrally planned economies of eastern Europe and the U.S.S.R., and "developing countries" to cover both the developing market economies and the Asian centrally planned economies. Israel, Japan and South Africa have been removed from the Near East, Far East and Africa regional groups respectively and are presented under "developed market economies." Western Europe includes Yugoslavia, and the Near East is defined as extending from Cyprus and Turkey in the northwest to Afghanistan in the east, and including from the African continent Egypt, Libya and Sudan.

The trade index numbers of a country group are based on the total trade of each country included in the group irrespective of destination, and in consequence generally do not represent the net trade of the group.

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[1] For full details, including a list of weights, see FAO, *Production yearbook 1974*, Rome, 1975.

[2] For full details see FAO, *Trade yearbook 1974*, Rome, 1975.

HIGHLIGHTS

- World food and agricultural production is estimated to have increased by 2 to 3% in 1975. Output in the developed countries increased by only 1 to 2%, but in the developing countries it rose by 4 to 5%, contrasting favourably with the discouraging results of 1974.

- Preliminary estimates of world cereal production in 1975 showed an increase of 3 to 4%, as crops did well in most of the developing countries and in North America. However, final estimates indicate that these increases will be offset by less successful crops in the U.S.S.R., eastern and western Europe, and Oceania.

- The 2 to 3% increase in world livestock production in 1975 largely reflects increased slaughterings prompted by the serious problems which continue to affect the sector: high prices and scarcity of cereal fodder, and weak demand in industrialized countries due to the economic recession.

- For the third year in succession, cereal supplies will be determined almost entirely by the current crop in 1975/76. Current stock levels represent about 11% of world annual consumption, compared to over 20% during the early 1970s. Although larger grain crops are expected during 1975/76, there is little prospect of a substantial replenishment of stocks in the near future, given the current levels of world demand and the failure of the U.S.S.R. grain harvest.

- World fishery production rose by 6% in 1974, mainly as a result of increased catches by Chile and Peru and the far-ranging fleets of the U.S.S.R. and other centrally planned countries. Much of the increase was in fish used for reduction to fish meal and oil, but landings for direct human consumption also increased.

- World forest production fell slightly in 1974, reflecting lower demand for forest products caused by the economic recession.

- World export earnings from agricultural, fishery and forest products rose by an estimated 19% in 1974, a much lower growth rate than in 1973. Again, the rise in agricultural export earnings was largely due to rising prices, as the volume of agricultural trade in 1974 fell by 4%.

- Inflation rates for 1974 were higher than for previous years in practically all countries, with food prices tending to increase faster than all other prices.

- The pesticide supply situation remained extremely tight throughout 1974 and early 1975, with demand exceeding world production capacity by 10 to 30% and prices rising to as much as four times 1973 levels for some products. With estimated crop losses due to pests in developing countries reaching 50% or more for certain crops in given areas, the pesticide shortage can be expected to have serious damaging effects on harvests in 1976.

- In 1974 the scarcity and steep rise in prices of fertilizers produced a slackening in demand which allowed the accumulation of stocks of nitrogen and phosphate fertilizers. By the end of 1975, prices were down by about one third from their 1974 peak levels, and the supply situation had eased.

- Chapter 2 examines the main developments in the world's food and agricultural sector during the first four years of the Second United Nations Development Decade (DD2). Food and agricultural production has increased much more slowly than during the previous decade, and in many developing countries food production has not kept pace with population growth. Although the terms of trade of agricultural products in world markets have improved, the value of the developing countries' food imports has risen faster than that of their agricultural exports.

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1. WORLD REVIEW

World food and agricultural production increased marginally in 1974 as compared with the generally good results of 1973, and per caput output fell by 1%. Fishery production rose by about 6%, largely due to the recovery in Chilean and Peruvian anchoveta production. Forestry production fell slightly, reflecting lower demand for forest products caused by the severe recession in all the major industrialized countries. The total output of agricultural, fishery and forest commodities remained unchanged (Table 1-1). World cereal production fell in 1974 for the second time in three years with sharp reductions in the Far East, North America, Oceania and the U.S.S.R., where the harvest, although good, failed to match the exceptional one of 1973. The small rise in the index of total agricultural production in 1974 largely resulted from an expansion in livestock output, reflecting serious difficulties in this sector.

The lack of sufficiently plentiful harvests in 1974 made the danger of a large-scale food emergency very real in the closing months of the year. Disaster was avoided only by intensive national and international efforts. Food aid programmes were expanded. Cereal stocks were depleted even further, and are now far below the minimum level necessary for world food security. World cereal prices and freight rates declined, but failed to ease the import bill burden of the developing countries most seriously affected by the economic crisis. The apparent easing of the world food situation indicated by lower export prices for cereals was largely the result of economic recession, weakening demand, and expectations of larger 1975 crops.

In 1975 the hoped-for sharp recovery from the disappointing and potentially disastrous production results of 1974 was only partially realized, and the 5% recovery in world food production expected at mid-year had to be scaled down to a modest 2 to 3%. Food production in the developing countries was fortunately much better than in 1974, increasing by 4 to 5%. Results were especially good in the heavily populated Far East region, which has the highest concentration of poorly fed people. Monsoon conditions in the region were ideal, in sharp contrast to 1974, and the main rice crop will reach a new record. Bumper cereal crops were harvested in North America. However, the U.S.S.R. grain harvest was seriously damaged by drought, and crops in eastern and western Europe also failed to meet earlier expectations.

The shortfall in U.S.S.R. grain production for the second time in four years greatly added to the uncertainty of world markets. Large grain purchases by the U.S.S.R., which may eventually total 25 to 30 million tons (16 million tons confirmed by late October), in addition to continued high demand in other regions, mean that there is once again little possibility of any substantial replenishment of stocks, and wheat stocks may be lower. In 1976 the world will depend very heavily on the 1975/76 crop for its food supplies. Stocks are likely to remain close to minimum working levels and well below the minimum level considered necessary for world food security.

Grain prices, which had been declining since October 1974 in expectation of large crops in 1975, started to rise again in mid-July 1975 following the news of drought in the U.S.S.R. and of heavy grain purchases. These purchases have made the major

TABLE 1-1. — INDICES OF WORLD PRODUCTION OF AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1970 TO 1974

	1970	1971	1972	1973	1974[1]	Change 1973 to 1974[2]
	..... *1961-65 average = 100*					*Percent*
TOTAL PRODUCTION	120	124	124	130	130	—
Agriculture . . .	120	125	124	130	131	+1
Fishery[3]	139	143	144	148	155	+6
Forestry	114	116	117	120	118	—2
POPULATION . . .	114	117	119	121	124	+2
PER CAPUT TOTAL PRODUCTION . .	105	107	105	107	106	—1
Agriculture . . .	105	107	105	107	106	—1
Fishery[3]	122	123	121	122	125	+2
Forestry	100	100	99	99	96	—3

NOTE: For details of the methodology and coverage of these indices, see the explanatory note on page *x*.

[1] Preliminary. — [2] Percent changes from one year to another have been calculated from unrounded figures. — [3] Excluding China.

grain exporters increasingly vigilant of the effect the sales might have on domestic food prices and on supplies to regular customers. The recent trend toward long-term grain sales and purchase agreements such as that between the United States and the U.S.S.R. is a step toward bringing more stability into the grain trade, but the basic problem can be resolved only through a world-wide multilateral contract with a new international grains arrangement covering stocks, food aid and prices.

The ongoing deep recession in many of the industrialized countries continues to seriously affect most of the developing countries by sharply reducing import demand for their agricultural commodities, while higher prices of manufactured goods lead to a deterioration in their terms of trade.

Agricultural production

Production 1974 [1]

Both world food and agricultural production increased in 1974 by about 1% (Table 1-2). Performance in the developing countries was slightly better (2% increase) than in the developed countries (1%). However, there was no improvement per caput in either group of countries. In the developed regions, Oceania (−2%) and eastern Europe and the U.S.S.R. (−1%) recorded declines in food production, there was no change from 1973 in North America, the region on which world food security now so greatly depends, and there was an increase (4%) only in western Europe. Among the developing regions, only the Far East, where most of the world's malnourished are concentrated, suffered a drop in both food and agricultural production in 1974. The fall of about 3% implies a level of production only 3% above that reached in 1970. In the other developing regions, there were good results in Latin America (an increase of 5%) and a sharp recovery in Africa (also up 5 %), but still to only a relatively low level, while in the Near East a 10% increase took production above the high record level of 1972. Food production in China continued its steady upward movement, increasing by 2 to 3%.

Output increase in the first four years of this decade was much slower than that of the already disappointing longer term trend.[2] In the developing countries, increase in food production fell to only 1.7% a year in 1970-74 from 2.7% a year in 1961-74, well below their population growth, less than half the average annual increase of 3.6% required to meet effective demand to 1985, and even further below the 4% target set for the Second United Nations Development Decade (DD2). Table 1-3 shows that about half of the 97 countries listed produced less food per caput in 1972, 1973 and 1974 than in 1961-65, the base period. In fact, the combined populations of countries where per caput production was lower in 1974 than in the base period totalled some 1 200 million. However, as many as 26 countries with populations totalling 1 130 million (including China) produced at least 10% more food per caput in 1974 than in 1961-65.

Production of main commodities [3]

World wheat production fell in 1974 by about 4% from the 1973 record level, with a sharply reduced harvest in the U.S.S.R. and declines in several major producing areas, including Argentina, Australia, Canada and India. Wheat crops were better than in 1973 in western Europe, the United States, Brazil and several countries of the Near East. Although wheat production rose in all developing countries except those of the Far East, the percentage increase remained below the population growth rate. Although the 1974 wheat harvest was the second largest on record, it was insufficient to meet demand even at record price levels, and stocks again had to be depleted.

In 1974 world production of coarse grains fell 4% from the record level of the previous year despite an over-all 5% expansion in plantings. The entire coarse grains situation was influenced by a 7% fall in maize production which was largely due to drastically reduced yields in the United States caused by drought, and a poor crop in France. Among other grains, only barley and rye production increased, both by small amounts. World output of millet and sorghum fell by 7%, mainly owing to poor crops in India, the United States and, to a lesser extent, the U.S.S.R.

A slight decline in the 1974 world paddy crop from the 1973 record level was attributable to shortfalls in rice-importing countries and was mainly concentrated in India and Bangladesh, where yields were

[1] For details of regional production, see "World food and agricultural situation - February 1975," in FAO, *Monthly Bulletin of Agricultural Economics and Statistics*, 24 (4), p. 1-19.
[2] See Chapter 2.

[3] For a more detailed review of the commodity situation, see FAO, *Commodity review and outlook 1974-1975*, Rome, 1975.

TABLE 1-2. — INDICES OF WORLD AND REGIONAL FOOD AND AGRICULTURAL PRODUCTION, 1970 TO 1974

Production / Region	Total						Per caput					
	1970	1971	1972	1973	1974[1]	Change 1973 to 1974	1970	1971	1972	1973	1974[1]	Change 1973 to 1974
	..... 1961-65 average = 100					Per-cent	..... 1961-65 average = 100					Per-cent
Food production												
DEVELOPED MARKET ECONOMIES[2]	116	123	122	126	128	+ 2	108	114	111	114	115	+1
Western Europe	117	121	119	125	130	+ 4	110	114	111	116	120	+3
North America	113	124	122	124	124	0	104	113	110	111	110	—1
Oceania	121	127	126	140	137	— 2	106	109	107	117	113	—3
EASTERN EUROPE AND THE U.S.S.R.	130	132	133	148	146	— 1	121	122	122	135	132	—2
Total developed countries	121	126	126	134	135	+ 1	112	117	115	121	121	0
DEVELOPING MARKET ECONOMIES[2]	124	125	125	129	131	+ 2	103	102	99	99	99	—1
Latin America	124	125	127	128	135	+ 5	102	100	98	97	99	+2
Far East	124	125	121	132	128	— 3	104	102	97	103	97	—5
Near East	124	127	138	130	143	+10	102	101	107	98	105	+6
Africa	121	124	124	121	127	+ 5	102	101	99	93	96	+2
ASIAN CENTRALLY PLANNED ECONOMIES	122	125	124	130	133	+ 2	107	108	105	108	109	+1
Total developing countries	123	125	125	129	132	+ 2	105	104	101	102	102	0
World	121	126	125	131	132	+ 1	106	108	105	108	107	—1
Agricultural production												
DEVELOPED MARKET ECONOMIES[2]	113	120	119	122	124	+ 2	105	111	109	111	112	+1
Western Europe	116	121	119	125	130	+ 4	110	114	111	115	119	+3
North America	109	119	118	120	119	0	100	108	106	107	106	—1
Oceania	120	123	122	127	123	— 3	106	107	104	107	102	—4
EASTERN EUROPE AND THE U.S.S.R.	129	132	133	147	146	— 1	121	122	122	134	132	—2
Total developed countries	119	124	124	131	132	+ 1	111	115	113	119	119	0
DEVELOPING MARKET ECONOMIES[2]	123	124	125	128	131	+ 2	103	101	99	99	98	—1
Latin America	122	122	125	126	132	+ 5	100	98	97	95	97	+2
Far East	124	124	122	132	129	— 3	104	102	97	103	98	—5
Near East	124	127	138	130	143	+10	102	102	107	98	104	+6
Africa	121	123	124	121	127	+ 5	102	101	99	93	96	+3
ASIAN CENTRALLY PLANNED ECONOMIES	122	126	124	131	134	+ 2	108	109	106	109	110	+1
Total developing countries	123	125	125	129	132	+ 2	104	103	101	102	102	0
World	120	125	124	130	131	+ 1	105	107	105	107	106	—1

[1] Preliminary. – [2] Including countries in other regions not specified.

affected by drought and floods in an erratic monsoon season. Drought also reduced yields in Pakistan. In China, Japan, the Republic of Korea and the Philippines, rice crops surpassed 1973 levels, reflecting larger areas under cultivation, as well as double cropping, government incentives, and wider use of high-yielding varieties, while the rice crops of Indonesia and Malaysia benefited from favourable weather. Production also increased sharply in the United States and Australia, and to a lesser extent in some Latin American countries.

There was a marked 4% recovery in world meat production in 1974 after the stagnation of 1973. Beef and veal production in the developed countries, especially those of western Europe and North America, accounted for most of the increase. Owing to low domestic and overseas market prices and import restrictions elsewhere, output declined in Latin

TABLE 1-3. — FOOD PRODUCTION PER CAPUT IN 97 DEVELOPING COUNTRIES, 1972, 1973 AND 1974 (1961-65 AVERAGE = 100)

Index of food production per caput	1972		1973		1974	
	Countries	Population	Countries	Population	Countries	Population
		Percent		*Percent*		*Percent*
84 and below	16	5.7	15	4.7	18	8.3
85-89	7	3.6	6	1.8	4	1.4
90-94	12	4.0	14	7.7	13	26.0
95-99	14	33.2	11	6.6	11	7.7
	49	46.5	46	20.8	46	43.4
100-104	13	6.6	15	29.0	12	4.5
105-109	9	38.8	11	42.7	13	11.2
110-114	9	4.7	8	2.3	8	37.3
115 and above	17	3.4	17	5.2	18	3.6
	48	53.5	51	79.2	51	56.6
Total	97	100.0	97	100.0	97	100.0

America and even more sharply in Oceania. Pigmeat production was up by about 3%, mainly because of cutbacks in breeding stocks in western Europe and North America, increased slaughterings in Australia, Latin America, eastern Europe and the U.S.S.R., and a recovery in Africa. Poultry meat production expanded by about 5% despite output restriction agreements between major producers, and a cost-price squeeze. Following a two-year decline, mutton and lamb production remained stable, since the continuing decline in North America and the 14% drop in Oceania's output (in Australia ewes were retained after support prices were set for wool) were offset by increases in the developing and centrally planned countries.

World milk production rose only slightly in 1974, as output in the developed countries was curtailed by a decline in dairy cow numbers (especially in North America and Australia), high prices of concentrated feeds and bad weather in some areas. Only eastern Europe and the U.S.S.R. maintained substantial production growth rates. Little progress was shown in the developing countries.

World sugar production in 1974/75 was about 1.5% lower than the record output of the previous year because disastrous weather in many countries of northern and eastern Europe and in the United States cut yields back to the 1967/68 level. Only a few countries, including Morocco, Turkey and Yugoslavia, increased production significantly. Beet sugar output fell by nearly 8%. Cane sugar production rose to a peak level, with continued expansion in most Latin American and African countries and major gains in the Far East, especially in Thailand, India and Indonesia. After poor crops in 1973/74, Australia and South Africa recovered to record levels.

World production of citrus fruits (with the exception of grapefruit) rose slightly. In the Northern Hemisphere there was a 2% increase in orange production, mainly due to a record harvest in the United States. The Mediterranean zone showed only slight gains, with good harvests in Egypt and Greece and a 12% reduction in Spain. Tangerine production increased by 3%, with an unprecedented harvest in Japan compensating for a slightly lower output in the Mediterranean zone. Lemon production showed a strong increase mainly because of a record 40% rise in the United States. Grapefruit production was considerably lower, reflecting a 10% decline in the United States crop as a result of reduced output in Florida and Texas.

Banana supplies were expected to return to normal levels late in 1975 after an 18% decrease in over-all exports from Central America in 1974, caused mainly by the destruction of about 80% of the Honduran crop by hurricane Fifi, but also by disputes over the introduction of export duties between governments and exporters in Costa Rica, Panama and Honduras.

World output of fats and oils in 1974/75 was slightly lower than in the previous year, but was still in line with the longer term trend. Production of soybean and sunflowerseed oils, which registered unusually sharp expansion in the previous season, dropped sharply and outweighed gains in output of

a number of other fats and oils, mainly the "palm tree" oils and rapeseed oil. The drastic 8.5 million ton reduction in the United States soybean crop from the previous year's record harvest of 42 million tons was a dominant factor in world production of fats and oils in 1974/75.

The 1974/75 coffee crop was the largest since 1965/66, with good harvests in all coffee-producing regions, including a notable increase of about 90% in Brazil. Crops were large in most other Latin American countries, especially Colombia, because of high yields from the new Caturra varieties. Elsewhere, production recovered from the drought-affected 1973/74 season, with good crops in India and Indonesia, the major producers in the Far East, and further gains in New Guinea. Higher coffee prices encouraged larger plantings in general and government rehabilitation and expansion programmes, especially in Brazil, Colombia and Honduras.

Cocoa bean production rose in 1974/75 mainly due to a recovery from drought in Africa, although output fell short of production in the earlier years of the decade. In western Africa the rate of cocoa bean production was lowered in some areas by dry weather during the pod development season and by disease in others. In Ghana output recovered somewhat from the low 1973/74 level, but Nigerian production was still handicapped by unfavourable weather. Production in Latin America declined slightly: however, in Brazil the marked drop in the Bahia main crop was outweighed by a much larger *temporão* crop.

Tea production once again rose slightly in 1974, mainly due to gains of 8% in northeast India and 15% in Bangladesh. The upward trend in Africa was arrested, mostly because of drought in Kenya and neighbouring countries, although a subsequent improvement in conditions lessened the shortfall in the area.

Stimulated by strong demand and firm prices, world tobacco production rose by 7%, the largest gains being registered in major producing countries, in particular Argentina, Brazil, India, Rhodesia and Turkey. The 15% increase in the United States was also exceptional. In the smaller producing countries of western Europe the high 1973 production levels were maintained. Production of light cigarette leaf continued to advance due to sizeable increases in Argentina, Brazil, China, India, Rhodesia and the United States. Burley production recovered fully to the 1972 record level.

Expansion in world cotton production came to a halt in 1974 despite larger plantings. Increases in Australia, China, Mexico, Turkey, the U.S.S.R. and some western European countries were offset by drastically lower yields in other countries, especially the United States, where production fell by a further 10% because of drought in Texas and excessive rainfall in the central cotton belt. Drought also caused declines in Syria and Uganda. Although shifts to more profitable food crops lowered output in Brazil, Egypt, Pakistan and Sudan, and in Central America, total production in the developing countries rose by 2%.

In 1974/75 world production of jute, kenaf and related fibres fell by 20%, reflecting a marked shift to rice and other food crops in the main producing countries. Because of the highly unfavourable jute/rice price ratio and a deterioration in the competitive position of jute in relation to synthetic substitutes, output declined by 35% in Bangladesh, 28% in India and 48% in Thailand, while both plantings and production also decreased in Burma and Nepal.

World production of sisal and henequen increased by about 2% in 1974, thus arresting the downward trend of recent years. Tanzania registered the only sharp decline in output. Although harvests were slightly lower in Brazil (the world's major producer) and Madagascar, Kenya harvested a record crop which surpassed its high output of 1973 by nearly 50% as a result of the clearing of previously abandoned plantations and the increased output of unwashed hand-decorticated sisal by smallholders. With a 5% increase in henequen output, Mexico became the world's second largest hard fibre producer.

World output of natural rubber in 1974 remained near the 1973 level, although the results varied considerably by country. Malaysia's total output fell 2%, partly because of government action aimed at cutting back natural rubber production in response to falling prices. In Sri Lanka drought and lower market prices brought a 12% fall in production. In India and Indonesia output continued to rise, but at a lower rate than in 1973. However, production in Liberia and Nigeria, the major African producers, soared by 20%, as trees planted on concessions in the late 1960s reached maximum yields. Although the reduced demand for natural rubber continues to depress market prices, its lower price in relation to synthetic rubber and the continuing trend toward the production of radial tires in the United States have increased natural rubber's share in total elastomer utilization for the first time since 1958.

Although total wine production fell 5% in 1974/75 from the previous season's record level, it was still large by historical standards, thus giving rise to marketing and price problems which are likely to become more serious for the major European producers. In the European Economic Community

(EEC) output decreased by 7%, with a 10% decline in France, a fall of about 33% in the Federal Republic of Germany, and a slight reduction in Italy. Elsewhere in Europe production decreased by 9% in Spain (although the quality was superior), by 15% in Austria, by 33% in Switzerland, by 8% in Yugoslavia and by 27% in Hungary, and increased slightly in Portugal. Output in the U.S.S.R. showed some recovery. In the United States production was again large, with the grape harvest about the same as the previous year, but still nearly 65% above the low 1972 level. In North Africa, output increased in all countries but Morocco. In the Southern Hemisphere, production expanded in Argentina but remained relatively stable in South Africa.

Production 1975

FAO's first preliminary estimates for 1975 indicate that total world food and agricultural production increased by 2 to 3% in 1975 (Table 1-4). In the developed countries as a whole, total food production is estimated to have increased by only 1 to 2%. A sharp recovery of 5 to 6% in North America coincided with lower production in western Europe and only marginal gains in eastern Europe and the U.S.S.R., and in Oceania.

In the developing countries, for which data are still very tentative, food production in 1975 is estimated to have increased by 4 to 5%, which implies that per caput food production will have improved over-all. The most striking improvement was the 7 to 8% increase in the Far East, and Latin America again improved on its good performance of 1974 with an increase of 3 to 4%. Food production in the Near East rose by 5 to 6% above the high level attained in 1974, mainly reflecting the excellent cereal crops in Iran and Turkey, while the other countries of the region had poor crops. Africa has apparently made disappointingly small progress, and per caput food supplies are likely to be lower than in 1974. Food production in China is estimated to have increased by 2 to 3% in 1975, thus maintaining the fairly satisfactory upward trend.

The developing market economies' 4 to 5% increase in agricultural production in 1975 should be judged against their generally poor performance in recent years. During 1971-75, the first five years of DD2, output increased at only 2.5% annually (Near East 3.4%, Latin America 2.7%, Far East 2.6%, Africa 1.1%), and in the first four years by only 1.8%. Thus, the relatively good results of 1975 have helped to raise the average annual increase during 1971-75 close to the longer term trend (1961-74) of 2.6%

TABLE 1-4. — ANNUAL CHANGES IN WORLD AND REGIONAL FOOD AND AGRICULTURAL PRODUCTION, 1961 TO 1975 [1]

Production / Region	1961 to 1974 (annual average)	1971 to 1972	1972 to 1973	1973 to 1974	1974 to 1975[1]
	Percent				
Food production					
DEVELOPED MARKET ECONOMIES [2]	+2.3	—1.3	+3.2	+2.3	+1 to +2
Western Europe	+2.3	—1.7	+4.8	+4.3	—2 to —1
North America	+2.2	—1.9	+2.1	+0.7	+5 to +6
Oceania	+2.8	—0.5	+10.5	—5.2	0 to +1
EASTERN EUROPE AND THE U.S.S.R.	+3.7	+0.5	+11.8	—1.5	0 to +1
Total developed countries	+2.8	—0.6	+6.5	+0.8	+1 to +2
DEVELOPING MARKET ECONOMIES	+2.7	+0.2	+3.0	+2.0	+5 to +6
Latin America	+2.8	+1.2	+1.0	+5.7	+3 to +4
Far East [3]	+2.6	—2.7	+8.8	—2.9	+7 to +8
Near East [4]	+3.2	+8.9	—5.5	+9.9	+5 to +6
Africa [5]	+2.4	+0.6	—2.9	+5.2	+1 to +2
ASIAN CENTRALLY PLANNED COUNTRIES	+2.7	—1.2	+4.6	+2.5	+2 to +3
Total developing countries	+2.7	—0.3	+3.5	+2.2	+4 to +5
World	+2.7	—0.5	+5.3	+1.3	+2 to +3
Agricultural production					
DEVELOPED MARKET ECONOMIES [2]	+2.1	—0.6	+2.6	+2.0	+1 to +2
Western Europe	+2.3	—1.6	+4.7	+4.2	—2 to —1
North America	+1.8	—0.6	+1.7	+0.5	+4 to +5
Oceania	+2.3	—0.8	+3.6	—5.2	+3 to +4
EASTERN EUROPE AND THE U.S.S.R.	+3.5	+0.5	+11.3	—1.1	0 to +1
Total developed countries	+2.6	—0.2	+5.9	+0.7	+1 to +2
DEVELOPING MARKET ECONOMIES	+2.6	+0.6	+2.8	+2.1	+4 to +5
Latin America	+2.6	+1.8	+0.8	+5.6	+2 to +3
Far East [3]	+2.6	—2.2	+8.5	—2.8	+7 to +8
Near East [4]	+3.2	+8.5	—5.8	+9.9	+3 to +4
Africa [5]	+2.4	+0.8	—2.9	+5.5	+1 to +2
ASIAN CENTRALLY PLANNED COUNTRIES	+2.8	—1.2	+5.1	+2.4	+2 to +3
Total developing countries	+2.7	0	+3.5	+2.2	+3 to +4
World	+2.6	—0.1	+4.9	+1.3	+2 to +3

NOTE: Data for total agricultural production and for food production are based on net production, with deductions for seed and feed, except for eastern Europe and the U.S.S.R., for which no deductions have been made. Data for cereals and livestock are based on total production, without any deduction.

[1] Preliminary. — [2] Including Israel, Japan and South Africa. — [3] Excluding Japan. — [4] Excluding Israel. — [5] Excluding South Africa.

annually. Nevertheless, the 4 to 5% recovery from 1974 is still below the rate of about 6% needed this year and in the remaining five years of the decade for the DD2 target of an average annual increase of 4% to be attained for developing countries as a whole. Maintaining even the 4% rate for the rest of the decade would require unprecedented efforts and a long spell of good weather.

The food situation in October 1975 contrasted favourably with the situation in late 1974 following poor harvests in North America, the major grain exporter, and the Far East, the major importer. It also compared well with 1972, when the United States had poor harvests at the same time as the U.S.S.R., India, China and several other major importing areas, although stock levels were higher then. A special problem at that time was the shortfall in the production of rice, the staple foodstuff of many Asian countries. In contrast, record rice crops were expected in 1975 in India and China, and rice crops were expected to be generally good to excellent in other major producers, including the United States. While the over-all situation remains unsatisfactory, with no assurance of food security, the circumstances in developing countries improved in comparison to 1974. In October 1975, only seven countries were reported as suffering from serious food shortages, compared to 18 countries a year earlier. Countries in the Sahelian zone in western Africa have received widespread seasonal rains since mid-August.

The index of world cereal production increased by 3 to 4% in 1975 (Table 1-5).[4] It remained unchanged in the developed regions. Cereal crops generally did well in most of the developing countries, however, particularly in China and India, so there should be some improvement in per caput supplies in those countries. Although the yield of all the 1975 Asian rice crops is not yet known, rice production is certain to be large because there was a very favourable monsoon. By contrast, important reductions in cereal crops mainly occurred in some of the richer countries, where a large part of cereal production is fed to livestock. Damage caused by drought to the U.S.S.R. grain harvest, which fell short by a least 45 million tons of the planned 216 million tons,[5] was far more serious than originally foreseen. Crop conditions also deteriorated, although to a lesser extent, in eastern and western Europe. These shortfalls are to some extent likely to be balanced by reductions in grain fed to livestock as a result of the world economic recession. There was

[4] With the announcement in early December 1975 that the U.S.S.R.'s 1975 cereal output was in the range of 133 to 141 million tons — much lower than earlier estimates — the revised world estimate now shows only a slight increase (0.7 %) over 1974.

[5] Cereals and pulses.

TABLE 1-5. — ANNUAL CHANGES IN WORLD AND REGIONAL CEREAL AND LIVESTOCK PRODUCTION, 1961 TO 1975 [1]

Production / Region	1961 to 1974 (annual average)	1971 to 1972	1972 to 1973	1973 to 1974	1974 to 1975[1]
	..... *Percent*				
Cereal production					
DEVELOPED MARKET ECONOMIES [2]	+2.7	—2.9	+3.7	—3.7	+6 to +7
Western Europe	+3.4	—0.2	+1.5	+6.0	—8 to —7
North America	+2.7	—4.4	+4.6	—12.3	+20 to +21
Oceania	+2.9	—25.4	+57.7	—3.7	—10 to —9
EASTERN EUROPE AND THE U.S.S.R.	+4.2	—3.5	+22.5	—9.0	—11 to —10
Total developed countries	+3.3	—3.1	+10.6	—5.8	0
DEVELOPING MARKET ECONOMIES	+2.7	—2.5	+6.1	—1.3	+8 to +9
Latin America	+3.3	—5.5	+8.2	+4.7	+5 to +6
Far East [3]	+2.8	—4.6	+12.3	—6.2	+10 to +11
Near East [4]	+2.3	+7.5	—13.4	+11.3	+13 to +14
Africa [5]	+1.9	+4.5	—13.3	+12.6	—6 to —5
ASIAN CENTRALLY PLANNED COUNTRIES	+3.1	—1.9	+5.5	+2.8	+3 to +4
Total developing countries	+2.9	—2.3	+5.8	+0.3	+6 to +7
World	+3.1	—2.7	+8.3	—2.9	+3 to +4
Livestock production					
DEVELOPED MARKET ECONOMIES [2]	+2.0	+0.4	—1.2	+3.5	0
Western Europe	+2.4	+0.2	+2.0	+5.3	0 to +1
North America	+1.4	—0.2	—4.3	+3.9	—2 to —1
Oceania	+1.7	+2.4	—2.9	—7.0	+5 to +6
EASTERN EUROPE AND THE U.S.S.R.	+3.8	+3.8	+3.2	+6.2	+6 to +7
Total developed countries	+2.5	+1.4	+0.2	+4.4	+1 to +2
DEVELOPING MARKET ECONOMIES	+2.7	+3.3	+1.2	+2.6	+3 to +4
Latin America	+2.9	+5.0	0	+2.9	+4 to +5
Far East [3]	+2.8	+3.7	+4.1	+2.0	+2 to +3
Near East [4]	+2.7	+2.5	+1.3	+3.5	+2 to +3
Africa [5]	+2.0	—1.8	—1.2	+1.8	+2 to +3
ASIAN CENTRALLY PLANNED COUNTRIES	+2.4	+2.9	+2.4	+2.0	+1 to +2
Total developing countries	+2.6	+3.2	+1.6	+2.4	+2 to +3
World	+2.6	+1.8	+0.6	+3.9	+2 to +3

NOTE: Data for total agricultural production and for food production are based on net production, with deductions for seed and feed, except for eastern Europe and the U.S.S.R., for which no deductions have been made. Data for cereals and livestock are based on total production, without any deduction.

[1] Preliminary. — [2] Including Israel, Japan and South Africa. — [3] Excluding Japan. — [4] Excluding Israel. — [5] Excluding South Africa.

a sharp fall in grain fed to livestock in developed regions in 1974 for the same reason.

World livestock production is estimated to have increased by 2 to 3% in 1975 following a 3.9% gain in 1974. Demand for livestock products is generally weak in industrialized countries because of the economic recession, and production fell in North America by 1 to 2% and was stagnant in western Europe. A high rate of slaughterings in Oceania, due in part to drought-affected pasture, resulted in a 5 to 6% increase in livestock production. In eastern Europe and the U.S.S.R. output rose by an estimated 6 to 7% for the second year in succession as part of the long-term plan to raise meat consumption. Production continued to rise in the developing countries (2 to 3%), with a sharp 4 to 5% increase in Latin America.

The urgent need for the U.S.S.R. to import an estimated 25 million tons of grain in 1975/76 to replace losses mainly caused by drought is largely based, as in 1972, on the needs of a livestock industry geared to a policy of increased meat consumption, in contrast to the earlier practice in times of poor domestic harvests of slaughtering animals to equate feed usage to local cereal availabilities.

Production of main commodities

Wheat production is estimated to have increased by 3% in 1975 to about 371 millions tons, slightly lower than the 1973 record, but still the second largest ever. Wheat forecasts were steadily lowered as the full extent of the damage caused by unfavourable weather in some areas of the world was revealed. These lower estimates meant that crops in the United States were smaller than had been hoped, and that shortfalls in European and especially U.S.S.R. production were larger than had been expected. In the U.S.S.R. production is now estimated at about 82 million tons compared with earlier forecasts of 95 to 100 million tons, and the eventual output may in fact be the lowest since 1969. There was a record crop of 58 million tons in the United States, 9 million tons higher than the previous best of 1974, and good crops in Canada and in the developing countries as a group. Record wheat crops were reported in China and India.

After initial large United States sales in July, a temporary export ban on sales to the U.S.S.R. limited the increase in wheat prices, which continued to oscillate until mid-October. Prices were expected to rise again following the announcement of the grain sales agreement, which initially did not seem to have made much impact. The export price of United States wheat (Hard Winter No. 2. f.o.b. Gulf) fell from U.S.$193 per ton in October 1974 to $126 in June 1975, but was up again to $165 at mid-October (Table 1-6).

Table 1-6. — Recent changes in export prices of selected agricultural commodities

Year / Month	Wheat (U.S. No. 2 Hard Winter, Ordinary f.o.b. Gulf)	Rice (Thai white rice 5%, f.o.b. Bangkok)	Maize (Yellow No. 2, f.o.b. Gulf)	Soybeans (U.S., c.i.f. Rotterdam)	Sugar (Isa composite price, world market, f.o.b. and stowed Caribbean ports)	Coffee (Ico composite price, New York ex-warehouse)
	U.S. dollars/metric ton				*U.S. cents/pound*	
1972: January	60	131	51	125	7.90	44.80
June	60	136	53	138	6.33	47.76
1973: January	108	179	79	214	9.40	57.03
June	106	205	102	470	9.38	62.78
1974: January	214	538	122	261	15.16	66.22
June	154	596	117	228	23.51	71.49
1975: January	169	399	132	256	38.31	64,96
June	126	346	118	207	13.65	63.00
July	144	329	117	224	16.69	60.01
August	162	348	131	243	18.61	88.49
September	169	358	122	227	15.50	85.81
October [1]	165	358	120	225	14.07	84.59
Average: 1971	62	129	58	126	4.50	44.66
1972	70	151	56	140	7.27	50.34
1973	139	[2] 368	98	290	9.45	62.16
1974	181	542	132	277	29.66	67.95

[1] October (first two weeks), all commodities. – [2] Thai rice, as well as rice from most other regions, was not quoted regularly on the world market from the second week of March to November 1973; this average is estimated on the basis of the few quotations that are available and is only indicative of the change that has taken place in prices.

World import requirements of wheat in 1975/76 are estimated at 66 to 71 million tons (11 to 13 million tons for the U.S.S.R.) against actual imports of 62 million tons in 1974/75. It is therefore possible that world trade in wheat in 1975/76 may equal or even exceed the previous record of 68 million tons in 1972/73, when severe strain was put on wheat markets by heavy shipments to the U.S.S.R. Total export availabilities in 1975/76 are likely to match import requirements but leave little or no margin for stock improvement. The wheat supply/demand situation is thus likely to remain tight.

World production of coarse grains in 1975 is estimated at about 665 million tons, some 2% more than last year but still below the record set in 1973. Although the area sown to coarse grains increased, earlier expectations of larger harvests deteriorated during the early part of the season. The main factor leading to the better output of 1975 was the large increase (23%) in United States maize production. World production of maize (about 321 million tons) set a new record, exceeding the extremely poor 1974 production by 10% and the previous record of 1973 by 3.5%. Production of barley, oats, rye and other cereal crops apart from millet and sorghum decreased in 1975.

World import requirements of coarse grains in 1975/76 are provisionally estimated at almost 70 million tons, of which 13 million are for the U.S.S.R. and 7 million for eastern Europe. Export availabilities are expected to be sufficient to meet this demand, but the rebuilding of stocks in the current year is likely to be on a more limited scale than anticipated. However, production estimates are still not final in either importing or exporting countries, and could still change sufficiently to alter the trade outlook. Also, the effect of higher grain prices on feed consumption in both groups of countries could considerably affect demand for coarse grains, particularly as vegetable proteins, especially soybeans, are more plentiful and likely to be more competively priced than in 1974.

World production of rice (paddy) is likely to be about 342 million tons, or some 6% higher than in 1974, largely reflecting the adequacy and timeliness of the monsoon rains in Asia, where the bulk of the world paddy crop is harvested toward the end of the year. Record crops were expected in China, India and a number of other countries of the Far East, as well as outside the region. In spite of the improvement of per caput rice availabilities in Asia, these may, however, still be below 1967-71 levels.

The improvement in rice supplies should help to alleviate the pressure on the market for other cereals. The price relation between rice and other grains still appears less favourable to rice than during the period before the world-wide shortage of cereals developed in 1972. Rice prices, which had declined substantially from the very high level of autumn 1974, rose marginally in August 1975 and have since stabilized. Good prospects for the paddy crop have moderated the seasonal tendency to higher prices in the pre-harvest period.

Total production of oil-bearing crops (measured in oil equivalent) is estimated to have increased by more than 7% in 1975, largely due to a greatly increased soybean crop (up 16%), especially in the United States and Brazil (up 27%). Good harvests of groundnuts and palm products are also expected in virtually all the main producing countries. These increases far outweigh the decline in production of sunflowerseed (mostly in the U.S.S.R.) and in cottonseed.

World meat production in 1975 is expected to be up 2 to 3%, with a 5 to 6% increase in beef and veal, a 1 to 2% rise in mutton and lamb and in poultry meat, and a small decrease in pigmeat production. As noted earlier, the persisting economic recession has reduced the demand for meat products, and the consequent fall in producer prices, combined with the high cost of coarse grains for cattle feed and the effect of drought on pasture and forage, led to high slaughter rates in 1975 at a time when cattle inventories had reached record levels simultaneously in all the major producing and consuming countries. Beef production rose less than the rate of slaughtering, however, as carcass weights were generally lower owing to less intensive grain feeding in the face of the continuing cost/price squeeze in feeding operations.

High slaughter rates, particularly for calves and heifers, are expected to continue into 1976 in several countries. As a consequence, lower cattle inventories and lower beef production are anticipated in the following years. There are, however, many uncertainties in the livestock outlook related to feed supplies and prices, and to the level of consumer demand as it is affected by the general economic situation. World trade prospects on the whole remain discouraging, since no major demand increases are foreseen at least until mid-1976 and import restrictions are being maintained, although they were partially relaxed in the EEC and Japan in the second half of 1975. Therefore, it is expected that an excess of export availabilities over import requirements will lead to an accumulation of additional stocks by the end of the current year and probably well into 1976.

Milk production is estimated to have increased slightly in 1975. Demand for milk and milk products has declined, however, and resulting milk surpluses have led to the accumulation of very high stocks of

skim milk powder and other milk products (particularly in the EEC) which call for effective measures by governments to bring supplies in balance with demand.

Expansion in sugar beet planting in response to high sugar prices was responsible for about two thirds of the rise of some 7% in world sugar output in 1975, which will, however, be lower than expected because of bad weather in Europe and the U.S.S.R. In the last five years, cane sugar production, which accounts for more than 60% of total centrifugal sugar production, increased at 3.8% annually while beet sugar rose at only 0.4%. Sugar prices generally moved downward in 1975, but rose temporarily in July and August when it seemed output would be much lower than expected. Prices remain very sensitive to market expectations and may thus fluctuate considerably.

Coffee production in 1975 is expected to decline by about 8% from the high 1974 level. A severe frost which hit Brazil's major coffee areas in July is expected to reduce that country's 1976 crop by half. However, sizeable stocks should allow demand to be adequately met in 1975/76.

There appears to have been an increase in the production of cocoa. Tea production is not expected to change significantly. Demand for these commodities is stagnant and may even decline, at least until the general economic situation improves.

Production of cotton is estimated to have fallen by as much as 8% in 1975. Since demand expectations are moderately optimistic, however, the large cotton stocks are likely to decrease. Output of raw jute is estimated to be as low as (if not lower than) in 1974. Nevertheless, existing large jute stocks, competitive prices of synthetic fibres (in spite of oil price increases) and the recession all point to a probable excess of export availability over import requirements. There appears to have been a decline in production of sisal and other hard fibres. Rubber is estimated to be down 8% or more. Output of wool, and of hides and skins, on the other hand, appears likely to increase.

Agricultural trade [6]

Trade in 1974

World export earnings from agricultural, fishery and forest products rose by an estimated 19% in 1974, a much lower growth rate than in 1973.[7] The value of exports of major agricultural commodities increased by about 16% to U.S.$72 400 million, little more than half the percentage gain in 1973.[8] Similarly, 1974 earnings from both fishery and forestry exports increased at a slower rate by about 10% (to $560 million) and 30% (to $6 500 million) respectively, compared to gains of 24% and 39% in 1973.

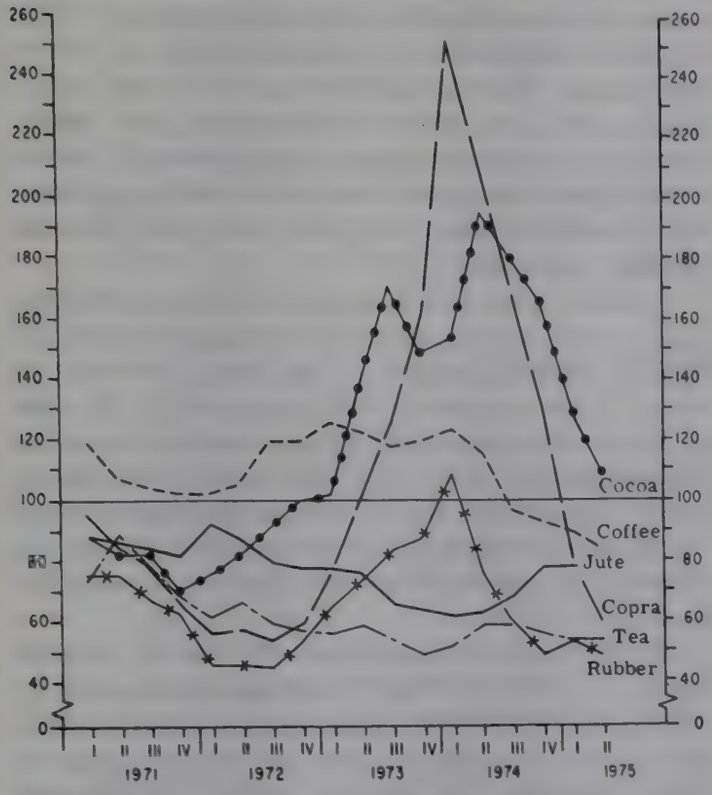
The net distribution of total export earnings from agricultural, fishery and forest products among the economic country groupings changed only slightly, with developed country earnings falling to 66% of the total and those of developing and centrally planned economies increasing to 22.5% and 8.5% respectively. However, for the first time in recent years, more than half of the total increase in agricultural export earnings ($5 400 million) accrued to the developing countries, although since sugar accounted for $3 000 million of this sum, the chief beneficiaries were Brazil, India, and some small island states. The developed countries' share of the gain was about 32.5%, or $3 250 million, while the centrally planned economies took the remaining 14%.

About 92% of the increase in agricultural export earnings came from sugar, rice, oils and fats. Coarse grains, beef, some milk products (especially butter), pepper, tea and cocoa registered smaller gains, while earnings fell for oilcakes and meals, mutton and lamb, pigmeat, coffee and wine. Earnings from hard fibres rose sharply and those from rubber moderately, while cotton earnings showed little improvement and those from hides and skins and jute declined.

The volume of agricultural trade in 1974 fell by about 4%, in contrast to the above-average 6% increase in 1973. This reflected a decrease in trade of some important commodities such as coarse grains, beef, sugar, hard fibres and cotton. The lower volumes traded for some of these commodities were associated with reductions in exportable supplies, the introduction of export regulation measures, and import restrictions in some countries. A major influence on the volume of world trade was the depressed level of economic activity in all industrialized countries. It led to a contraction in demand, especially for high-cost food commodities such as meat, milk products, fruits, wine and fishery products, which are particularly sensitive to changes in real income. Also, demand for some commodities such as jute and hard

[6] For a detailed review, see FAO, *Commodity review and outlook 1974-1975*, Chapter 1, Rome, 1975.
[7] At current prices, based on preliminary estimates. See Annex Table 6.
[8] Excluding most processed commodities and wool, poultry meat, hides and skins, for which data were not available at the time of writing.

FIGURE 1-1. — INDICES OF AGRICULTURAL COMMODITY TERMS OF TRADE (1963 = 100)[1]



[1] Studies are based on: price of individual agricultural commodity ÷ price of manufactured goods (United Nations Export Prices Index).

fibres fell because of the lower prices of synthetic substitutes.

The 1974 rise in agricultural export earnings was therefore largely due to rising prices. However, according to the United Nations Export Prices Index, prices in 1974 rose at a slower rate than in 1973, (25%) compared to the exceptional 48% rise of 1973, and by the end of 1974 most commodity prices had fallen from peak levels. This fall in commodity prices is illustrated in Figure 1-1.

However, the gains in agricultural export earnings during 1974 were almost entirely offset by increased prices of manufactured goods. The United Nations Index of Export Unit Values of Manufactures rose by about 19%, exactly the same as the estimated increase in the value of total world exports of agricultural, fishery and forest products. Thus, at current prices, the developing countries gained only moderately (about 3.4%) in real value from the 23% rise in their agricultural export earnings.

Trade outlook for 1975/76

The present outlook for agricultural trade markets in 1975/76 is governed by three main factors: anticipated increases in production, particularly of grains; continuing economic recession for the rest of 1975 and early 1976 accompanied by high unemployment and a slight decrease in per caput income, with a probable upturn in mid- to late 1976; and declining inflation rates in the industrialized countries. Barring any unexpected reversals, these conditions point to further declines in most agricultural commodity prices, a continuation of the general downturn which set in at the end of 1974.

Prices of food commodities are likely to fall slightly, but are expected to remain relatively high as compared with non-food commodities, especially agricultural raw materials, until the expected economic recovery in industrialized nations in 1976.

A general fall in prices will probably lower total export earnings in 1975, since the volume of agricultural trade, especially in food commodities, is unlikely to show any significant change. The demand for most agricultural commodities is unlikely to improve significantly, with the possible exception of certain basic food commodities which have been in short supply for the previous two or three years. Since the current recession has been deeper and longer than any in the postwar period, the upturn is likely to be more pronounced, characterized by a rising demand for agricultural commodities, especially agricultural raw materials and some income-elastic food products. However, the pressure of demand on prices will depend upon commodity reserves and current supplies. Economic recovery may also be accompanied by a renewed acceleration of inflation, in which case the prices of many agricultural commodities could rise to new peaks, at least in money terms.

Longer term issues

The recent experience of an unprecedented boom in commodity prices followed by a rapid decline raises three major questions relating to longer term prospects in world commodity markets: What will be the future trend of agricultural prices? What will be their degree of instability? Will it be possible to effect income transfers between the richer and the poorer countries through international commodity arrangements? [9]

Whether world prices of agricultural commodities will in future settle at levels higher or lower than those prevailing before the recent boom will depend not only on trends in farm costs, but also on economic and social factors not directly connected with agriculture. The 1972-74 boom was largely due to the exceptional simultaneous expansion of economic activity in all the industrialized countries, widespread

[9] For a detailed review of these points, see FAO, *Commodity review and outlook 1974-1975*, Chapter 1, Rome, 1975.

production shortfalls resulting from bad weather, and rising costs aggravated by speculative buying to hedge against inflation and exchange rate adjustments. However, the upward movement in commodity prices also reflected a number of fundamental changes in the world economy. There is now a growing realization that non-renewable resources will in future have to be more carefully managed, that environmental protection is becoming increasingly important, and that pressure on agricultural resources may increase, causing a long-term rise in the general level of commodity prices in real terms.

Nevertheless, high commodity prices and recent policy decisions at national and international levels, including those adopted by the World Food Conference and the Seventh Special Session of the United Nations General Assembly, can be expected to stimulate research and encourage investment in both accelerated production and the more economical use of scarce inputs, so that rising demand might possibly be met without major long-term increases in prices.

In money terms, commodity prices are likely to remain considerably higher than they were before 1972 because past inflationary pressures have already been built into the economy, world inflation may accelerate again once economic recovery is underway, renewed stock accumulation is less likely to be allowed to reach levels which would significantly depress markets, and further advances in agricultural productivity may well involve greater cost increases than formerly.

Not only are international commodity prices generally likely to remain high in the future, but their instability could become a more recurrent feature of commodity markets due to the growing but spasmodic involvement of the U.S.S.R. in world agricultural trade, the possibility that international trade will become less important in relation to production with the consequence that even relatively small variations in production could lead to considerable fluctuations in world market prices, the lack of sufficient stocks to smooth out variations in supply, and the vagaries of nature compounded by temporary shortages of certain inputs or sudden changes in their prices.

The great diversity of the factors causing instability, including macroeconomic factors, indicates the need for a wide range of international stabilization measures for commodities designed to meet individual requirements. Measures which may prove appropriate for cereals may be ineffective for commodities which are subject to regular production cycles. These may require arrangements designed to achieve a better balance between production and demand over the longer term. Again, certain raw materials such as jute or sisal, for which price instability is no longer a major problem, may require more direct assistance to make them competitive with synthetic substitutes and enable growers to stay in production. Such distinctions must be given full recognition in any type of international price stabilization arrangement, whether this is eventually arrived at through an integrated, multi-commodity approach, or through a more pragmatic commodity-by-commodity approach.

A major issue now facing governments is whether, and to what extent, commodity arrangements can be used to effect transfers of real resources from the richer to the poorer countries, especially in the light of the Declaration and Programme of Action on the Establishment of a New International Economic Order, and of the Resolution on Development and International Economic Cooperation adopted by the Seventh Special Session of the General Assembly in September 1975.

This Resolution calls *inter alia* for an intensification of efforts to help developing countries to expand and diversify their trade, improve and diversify their productive capacity, raise productivity, increase export earnings, and develop exports of processed products and manufactures. It pinpoints the need for improving market structures for raw materials and commodities through international stocking or other market arrangements to promote equilibrium and through improved compensatory financing, and for encouraging the processing of raw materials in the developing countries. Some of the policy measures advocated for the transfer of real resources from the richer to the poorer countries are an increase in the level of development assistance funds to 0.7% of GNP by 1980; an increase in the resources of multilateral development institutions, notably the World Bank Group and the United Nations Development Programme (UNDP); higher compensation for export shortfalls; and greater International Monetary Fund (IMF) assistance for financing buffer stocks.

In the context of these recent initiatives, there is some doubt as to the effectiveness of traditional types of commodity price stabilization arrangements as instruments for the transfer of real resources from developed to developing countries.

The hard core of many commodity problems of vital interest to developing countries is not exclusively, or even primarily, rooted in trade. Although price stabilization is essental for its own sake and stabilization agreements may effect income transfers in certain cases, commodity agreements may not be the quickest way of transferring real resources from the richer to the poorer countries.

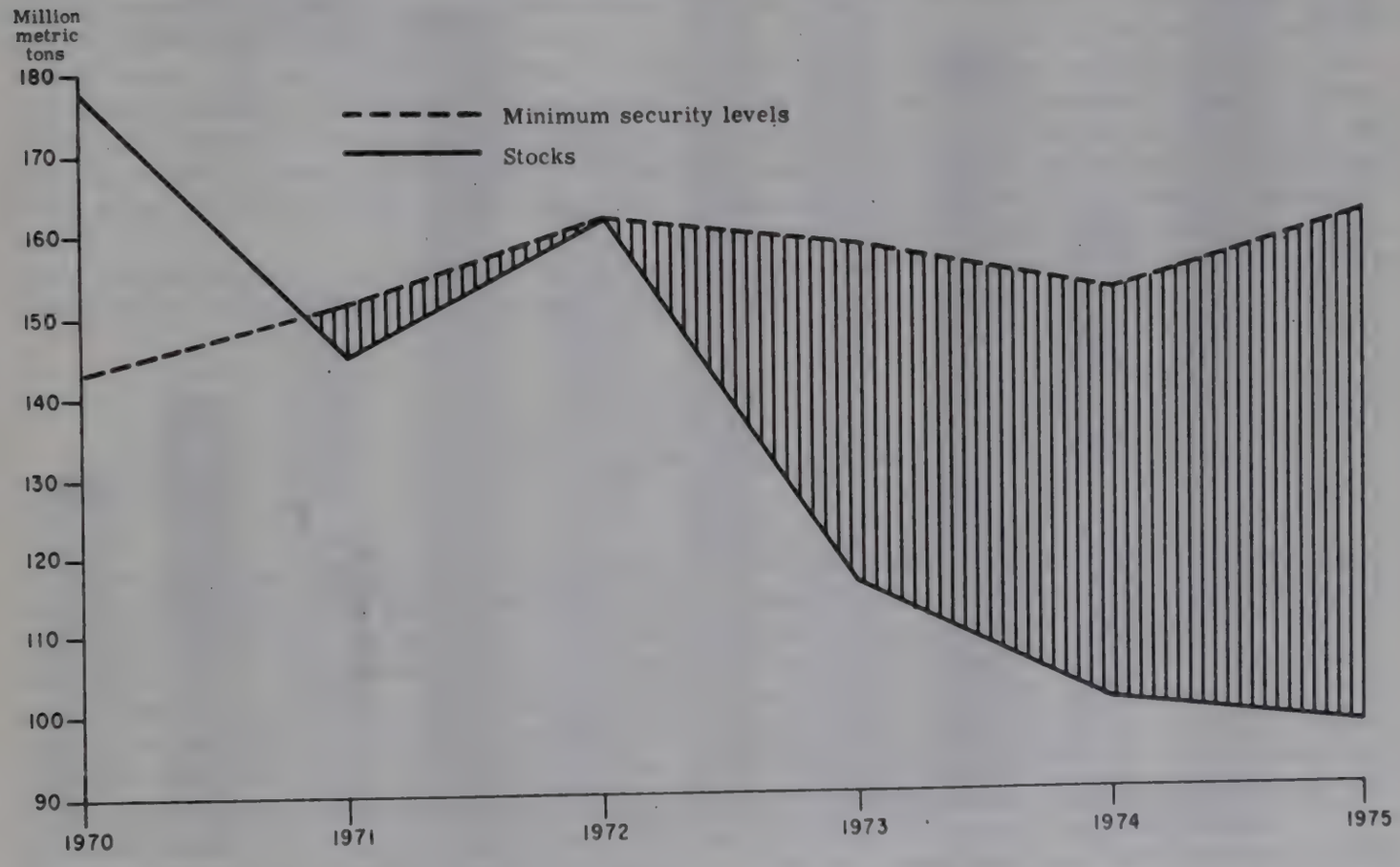
Consequently, an international commodity strategy focused firmly on the interests of the developing countries must embrace policy objectives and instruments covering not only trade, but also a variety of other measures such as commodity research and development programmes, diversification arrangements, industrial cooperation, coordination of national production policies, measures to expand consumer demand, and measures to develop exportable supplies of both raw and processed commodities. Such a treatment of commodity questions would represent the agricultural trade approach of the wider Strategy of International Agricultural Adjustment adopted by the Eighteenth Session of the FAO Conference held in November 1975. This embodies a consensus of the Member Governments of FAO as to the major changes to be sought in world agriculture, and sets forth policy guidelines which together constitute a broad policy frame for national and international efforts.

Stocks of agricultural products

Lower-than-expected world cereal production and an increasingly tight supply/demand situation in world markets resulted in a further depletion of cereal stocks in 1974/75 for the third year in succession.[10] World cereal stocks (excluding those of China and the U.S.S.R., for which no data are available) at the end of the 1974/75 crop years were approximately 98 million tons, more than previously estimated but still far below the generally accepted minimum contingency levels. Current stock levels represent about 11% of world annual consumption compared to 12 and 13% during the previous two seasons and over 20% during the early 1970s (Figure 1-2). Thus, current world food reserves are now barely sufficient to ensure an adequate flow of supplies from the farmer to the consumer. Although larger grain crops are generally expected during 1975/76, there is little prospect of a substantial replenishment of stocks in the near future, given the current levels of world demand and the failure of the U.S.S.R. grain harvest.

[10] Stocks of selected agricultural commodities are given in Annex table 10.

FIGURE 1-2. — WORLD [1] CEREAL [2] CARRY-OVER STOCKS AND MINIMUM SECURITY LEVELS,[3] 1970 TO 1975



SOURCE: FAO.

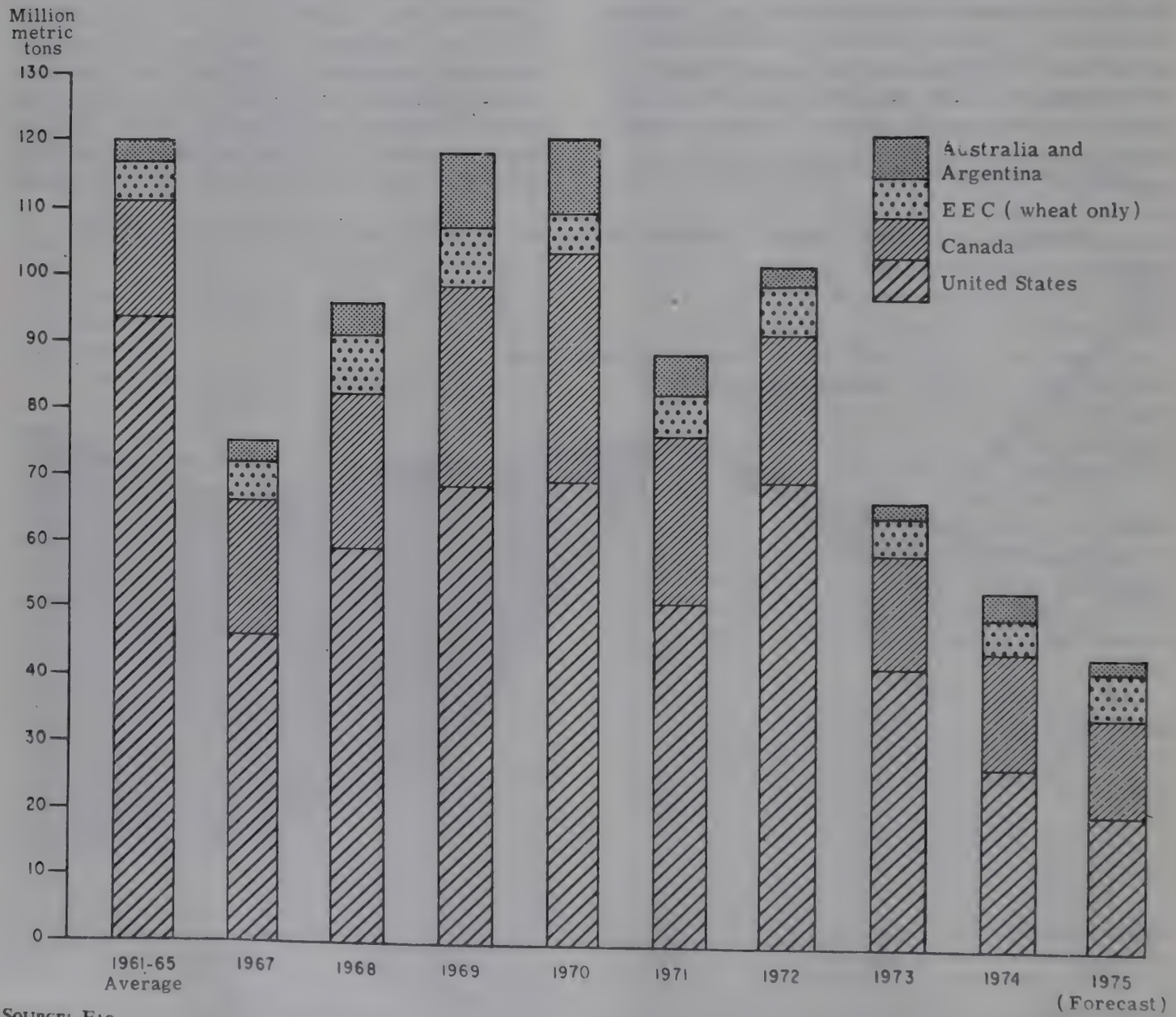
[1] Excluding China and the U.S.S.R. — [2] Wheat, coarse grains and milled rice. — [3] Equivalent to 18% of world consumption.

There is a growing awareness of the danger involved in inadequate food reserves and uncoordinated national food policies. A number of proposals have recently been put forward, in particular since the World Food Conference, to institute an international system of food stock policies. FAO's proposal of an International Undertaking on Food Security has been largely adopted by the international community and its implementation is being actively considered. A Committee on World Food Security, designed to keep under review the implementation of the Undertaking, was set up at the Eighteenth Session of the FAO Conference held in Rome in November 1975.

An important issue in the constitution of nationally held food reserves is their size. FAO's estimate is that stocks should represent 17 to 18% of world consumption, i.e. about 218 to 228 million tons on the basis of the 1972/73 to 1974/75 three-year average (including China and the U.S.S.R.). The United States has proposed the establishment of a 30 million ton reserve stock of cereals (25 million tons of wheat and 5 million tons of rice) in addition to 100 million tons of normal working stocks. This volume would be sufficient to offset over 90% of projected deviations below the world production trend.

Under the United States plan, cereals would be acquired in times of surplus and stocks released when shortages develop. This would give world grain markets greater stability. The purchases or sales of the reserve grain would be triggered by "quantitative

FIGURE 1-3. — VOLUME AND LOCATION OF GRAIN STOCKS IN MAJOR EXPORTING COUNTRIES, 1961-65 AVERAGE AND 1967 TO 1975



SOURCE: FAO.

indicators" based on the level of national grain stocks and on a comparison between recent production and a historical average. Other plans for commodity reserves usually allow price levels to trigger purchases or sales. The estimated $4 500 million cost would be shared between producer and consumer nations, with financial help provided to importing developing countries.

However, there is no general agreement that a reserve of 30 million tons would be adequate. World grain stocks have recently been reduced by 47 million tons, mainly as a result of 1972 crop losses. This, together with the reduced consumption of the past two years, would amount to as much as 70 million tons. Estimates by FAO and the U.S. Department of Agriculture indicate that a reserve of between 50 and 80 million tons of food and feedgrains would be required to assure reasonable stability of supplies and prices in periods of severe crop shortfalls.

Carry-over stocks of wheat in the major exporting countries (Argentina, Australia, Canada, the United States, and the EEC countries) at the end of the respective 1974/75 seasons were only marginally larger than the previous year (25.9 million tons against 25.5 million), when stocks were at their lowest in a quarter of a century. Large crops in the United States and the EEC prevented wheat reserves of exporting countries from declining further, since world demand remained steady and other major exporting countries heavily depleted their stocks. Changes in the volume and location of grain stocks in the major exporting countries between 1967 and 1975 as compared to the 1961-65 average are shown in Figure 1-3.

The over-all decline in world cereal stocks was largely due to a further depletion of coarse grain reserves. These reserves stood at 43 million tons by the end of the seasons 1974/75, 16 million tons smaller than a year earlier. All exporting countries except South Africa reported unchanged or reduced reserves of coarse grains while the United States' stocks were considerably smaller, mainly reflecting a drop in maize output.

Despite recent improvement in the rice supply/demand situation and generally optimistic short-term supply prospects, rice stocks represent no more than 9% of world consumption. As with other cereals, it is likely to take a long time before stocks can be replenished to adequate levels, particularly in poor, heavily populated countries with limited capacity to finance stocks.

Stocks of most other major storable food commodities are more plentiful, and even abundant. Dairy products in particular are plentiful, with developed countries holding record stocks of over 1.5 million tons of skim milk powder (about 6 months of world production) in September 1975. EEC intervention stocks alone constituted over two thirds of this amount. EEC butter stocks stood at 255 000 tons as of 1 November 1975. World oilseed stocks are also abundant, in particular soybean stocks, which rose in 1974/75 despite a sharp drop in the United States crop. The increase in oilseed stocks is likely to continue with an expected new record in the 1975/76 United States crop and little prospect for a substantial recovery in demand. Sugar stocks are only marginally larger than the low levels of the two previous years. Stocks of coffee continue their steady decline, partly reflecting supply problems arising from the severe frost in Brazil in July 1975. Coffee stocks are expected to fall substantially during the next few years as a result of this disastrous frost.

Consumer food prices

Inflation continued to accelerate in most countries of the world in 1974, and its effects were particularly felt during the first half of the year. Since then, there has been a moderate slowdown in inflation rates. However, inflation rates for the whole of 1974 were higher than the previous year in practically all countries. Food prices, which were a stabilizing force in the inflationary process until recent years, again tended to increase faster than all other prices. Out of 80 countries for which recent data are available, nearly 60 recorded a higher increase in consumer food prices than in general retail prices. This feature was particularly evident in the developing world, since all prices rose faster than food prices in only seven developing countries. Food price increases (Table 1-7) averaged 15% in developed countries (excluding Iceland and Israel, where they reached about 45%). The lowest increases were in northern European countries, particularly in the Federal Republic of Germany, the Netherlands and Sweden, and the highest increase was in Portugal (32%).

In the United States higher food prices were largely attributable to increased costs of processing and distribution, which account for half or more of retail

food prices. In Australia, too, increasing food prices largely appear to be a consequence of higher marketing costs. No significant price rises were recorded at the livestock auction level.

Food price inflation was higher than ever in the developing world. The highest rates were recorded again in countries in the Far East and Latin America, where food price increases averaged 33% and 27% respectively in 1974,[11] compared to an average of 20% for countries in Africa and the Near East.

Inflation and high food prices continue to be major problems for many governments, particularly in Latin America. Increases in international prices were major factors in Ecuador, El Salvador, Panama and Paraguay, and excessive money supplies in Bolivia, Chile and Ecuador. Food prices were affected more specifically by poor agricultural performances in Ecuador, El Salvador, Haiti, Jamaica, Mexico and Panama. Many governments in Latin America sought to lessen the impact of high food prices on low income groups by setting price controls, granting consumer subsidies on staple products and distributing free food to vulnerable groups, although the fiscal burden of carrying out these measures precluded their large-scale implementation.

In the densely populated countries of the Far East large numbers of people were reduced to very difficult circumstances by a shortage of foodgrains, especially rice, combined with rampant "imported" inflation and various natural disasters. Several food-importing countries used exchange rate adjustments to dampen inflationary pressure, although this policy hindered exports. On the other hand, food-exporting countries which until recently had enjoyed a high degree of price stability (e.g. Thailand) were saddled with heavy inflation, partly due to large exports of rice which sent domestic prices soaring. In India, the poor harvests of 1974 and speculative hoarding of grain made the food price situation particularly difficult; depleted stocks and low government procurements frustrated the Government's efforts to provide food below market prices, particularly to people in the rural areas. Many rural workers in India also found that farmers who used to pay them in kind now preferred to sell their high-priced grain and pay only cash wages, often insufficient to feed a family adequately. Prolonged drought conditions and rising import prices were major factors in sharp increases in food prices in Sri Lanka, where the Government introduced several measures to reduce the cost of its food subsidy programme. In particular, rice, wheat flour and sugar rations were reduced, and their prices raised. These measures implied a considerable deterioration in the amount and quantity of the food consumed by most people in Sri Lanka. Conditions in the Republic of Korea were particularly difficult, given the country's heavy dependence on imported foodstuffs. A number of emergency measures were introduced in January 1974, including cereal price subsidies and reduced taxes for low income groups. In Bangladesh the market price of rice increased threefold between January 1972 and June 1974, and doubled again in the next six months. Severe price controls were implemented to contain inflation, although this policy is believed to perpetuate shortages and encourage black market activities.

[11] Averages do not include Cambodia and Chile, where price increases were 285 % and 500 % respectively.

TABLE 1-7. — CHANGES IN CONSUMER FOOD PRICES, 1972-73 AND 1973-74

Percent price increase	1972-73	1973-74
	.... *Number of countries*	
DEVELOPED COUNTRIES (25)		
0-5	—	1
5-10	9	5
10-15	8	8
15 and above	8	11
DEVELOPING COUNTRIES (55)		
0-5	5	—
5-10	12	3
10-15	6	5
15 and above	32	47

SOURCE: Annex table 11.

In Africa the pattern of high food price increases varied. For example, good agricultural performances in 1974 in countries including Ivory Coast, Nigeria and Uganda, which would normally have led to stable prices, were more than offset by higher import prices. In other countries such as Ethiopia, Kenya, Mozambique and Tanzania, higher prices were largely caused by poor crops.

In every country food prices are an important political problem, particularly in recent years. Most governments face the problem of encouraging farmers to produce more food while keeping food prices in the urban centres as low as possible in order to help the large numbers of urban poor. Experience has shown that governments may overreact to rising food prices by setting price ceilings which inhibit farmers' efforts to increase production, thereby exacerbating rather than alleviating the problem of tight food prices. Much more study is needed on the complex subject of food prices and the alternative means of adjustment by governments and by consumers.

Development assistance

The flow of aid

Official financial flows to developing countries rose considerably in 1974 due to a large increase in aid from member countries of the Development Assistance Commitee (DAC) of the Organisation for Economic Co-operation and Development (OECD), from regional and international credit institutions, and from a new group of important donors — the Organization of Petroleum Exporting Countries (OPEC). Total official flows from DAC, centrally planned and OPEC countries amounted to approximately U.S.$38 000 million, compared to about $31 000 million in 1973. DAC official development assistance (ODA) is estimated to have represented about 76% of these totals. The increase in real terms was also substantial, despite widespread inflationary pressures and severe economic and financial difficulties faced by many donor countries. Once again, however, the flows of financial aid were dwarfed by the requirements of the recipient countries hit by high food, industrial equipment and oil import prices: the increase in the oil bill alone was estimated at $10 000 million, while the cost of cereal imports rose by about $6 000 million between 1972/73 and 1973/74. The high prices of primary commodities, which led to a temporary improvement in the terms of trade of developing countries, tended to decline in the course of 1974 and the first half of 1975 due to recession in the industrialized countries. OECD estimates that as a result of the recent shift in terms of trade, the industrial countries will gain $7 500 million from transactions with the poorer nations. A large number of countries hit by the economic crisis, particularly those identified by the United Nations as being "most seriously affected," registered record trade deficits in 1974 and are heavily in debt. Most of these countries cannot afford recourse to the hard terms of commercial borrowing and are heavily dependent on concessional aid. Also, the over-all flow of resources transferred to developing countries is often barely sufficient to cover debt servicing obligations, and can hardly be utilized for the financing of development programmes.

TABLE 1-8. — NET FLOW OF FINANCIAL RESOURCES FROM DAC COUNTRIES, 1970 TO 1974 [1]

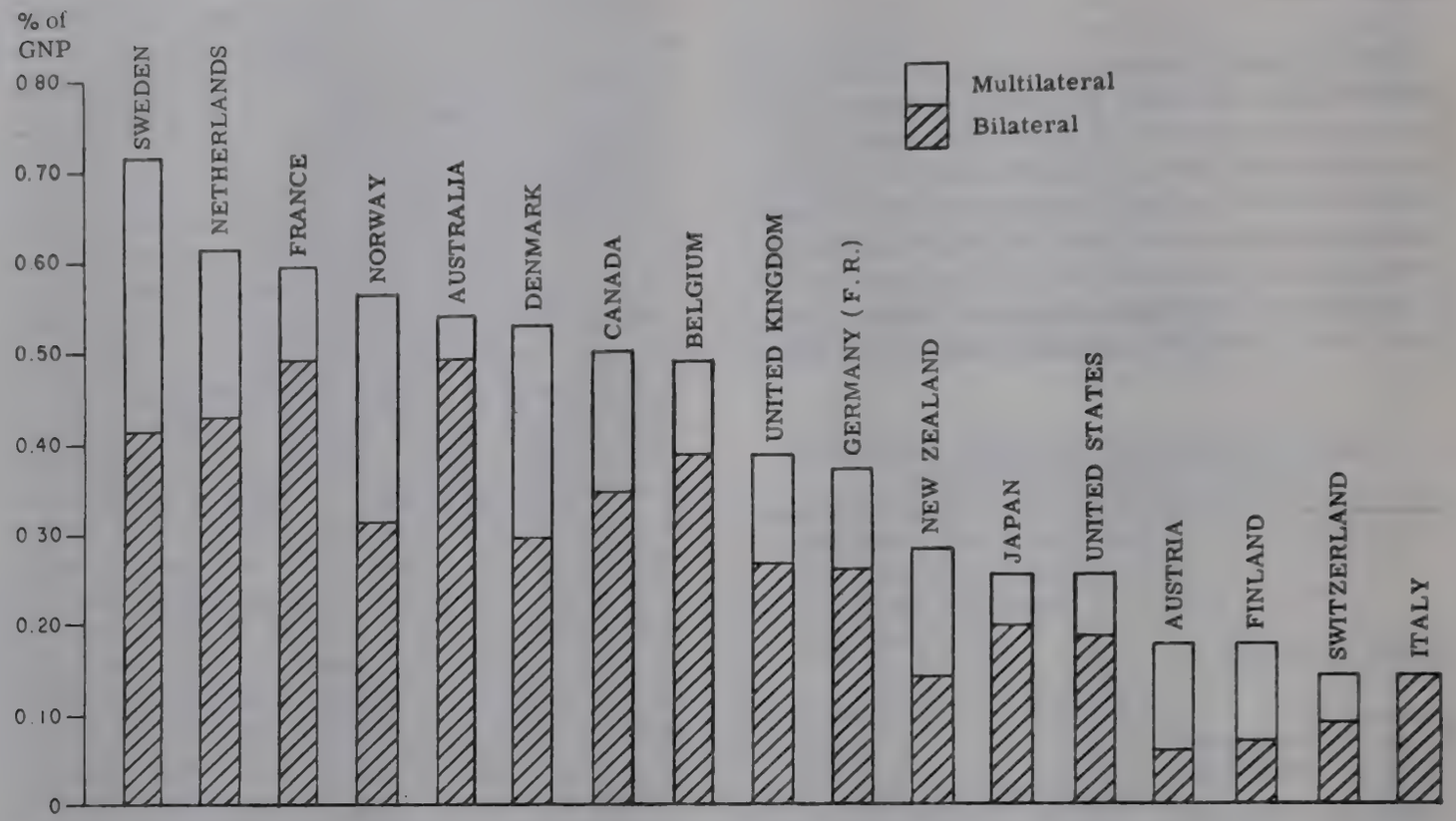
	1970	1971	1972	1973	1974[3]
	..... *Million U.S. dollars*				
OFFICIAL DEVELOPMENT ASSISTANCE[3]					
Bilateral grants	3 323	3 634	4 370	4 460	5 338
Bilateral development loans on concessional terms	2 384	2 786	2 396	2 649	2 918
Contributions to multilateral institutions . .	1 124	1 339	1 904	2 268	3 048
Total above	6 832	7 759	8 670	9 378	11 304
OTHER OFFICIAL FLOWS					
Bilateral	879	1 004	1 204	2 073	2 198
Multilateral	273	269	375	390	—16
Total above	1 152	1 271	1 579	2 463	2 183
Total official flows . . .	7 984	9 030	10 249	11 841	13 487
PRIVATE FLOWS					
Direct investment . . .	3 563	3 874	4 411	6 716	6 360
Bilateral portfolio . . .	726	760	2 067	2 952	3 257
Multilateral portfolio . .	474	771	667	257	—60
Export credits	2 185	2 810	1 430	1 196	2 477
Total private flows . .	6 949	8 215	8 575	11 122	12 035
GRANTS BY PRIVATE VOLUNTARY AGENCIES	858	913	1 033	1 364	1 222
Total official and private	[4]15 791	18 158	19 857	24 328	26 744

SOURCE: Organisation for Economic Co-operation and Development.

[1] Data refer to gross disbursements minus amortization receipts on earlier lending. – [2] Preliminary. – [3] Flows which are intended primarily to promote the economic development and welfare of developing countries, and which are intended to be concessional in character. – [4] Including grants by private voluntary agencies.

The largest source of official financial aid remains official development assistance from DAC countries. This assistance amounted to about $11 300 million in 1974, a significant nominal increase from the previous year (Table 1-8), and it represented about 76% of the estimated total from the main donor groups compared to 85% in 1973. As a share of the aggregated gross national product (GNP) of donor countries, ODA represented 0.33% against 0.30% in 1973 — the first substantial improvement in the declining trend of the past four years. However, the cost of aid-financed goods, which is estimated to have risen faster than prices generally, absorbed nearly all of the ODA real increase. In per caput terms of the population of developing countries, ODA represented $5.60 in 1974 compared to $3.70 between 1964 and 1966, but after allowing for inflation, ODA per caput has declined by more than 20% in real terms over the past decade. All 17 DAC members increased their ODA nominal contribution in 1974, and 13 also raised it as a share of their GNP. However, only one coun-

FIGURE 1-4. — OFFICIAL DEVELOPMENT ASSISTANCE OF DAC MEMBER COUNTRIES IN RELATION TO GROSS NATIONAL PRODUCT, 1974



SOURCE: *The OECD Observer*, 76, July/August 1975, Paris.

try met the 0.7% of GNP target agreed upon by the majority of DAC members (Figure 1-4).

Private capital flows from DAC countries are estimated at about $12 000 million, of which $6 400 million was direct investment and $5 600 million export credits and bilateral/multilateral portfolio investments. Portfolio and other private investments decreased from $3 200 million to $2 400 million, mostly reflecting smaller portfolio investment from Japan. Altogether, the net flow of resources for development from DAC members to developing countries amounted to $26 700 million, a 10% increase from 1973. However, in real terms there was actually a decline in the total flow of resources, and this sum represented only 0.78% of the combined GNP of DAC members, the same proportion as in 1973. The total flow was also short of the United Nations target of 1% of the GNP of donor countries, which was achieved by only five countries in 1974 (Figure 1-5). An additional $5 000 million would have been required to meet the 1% of GNP target. Eurocurrency lending to developing countries, which is not included in the above totals, might have exceeded $9 000 million on a commitment basis. A substantial part of these amounts originated in OPEC countries.

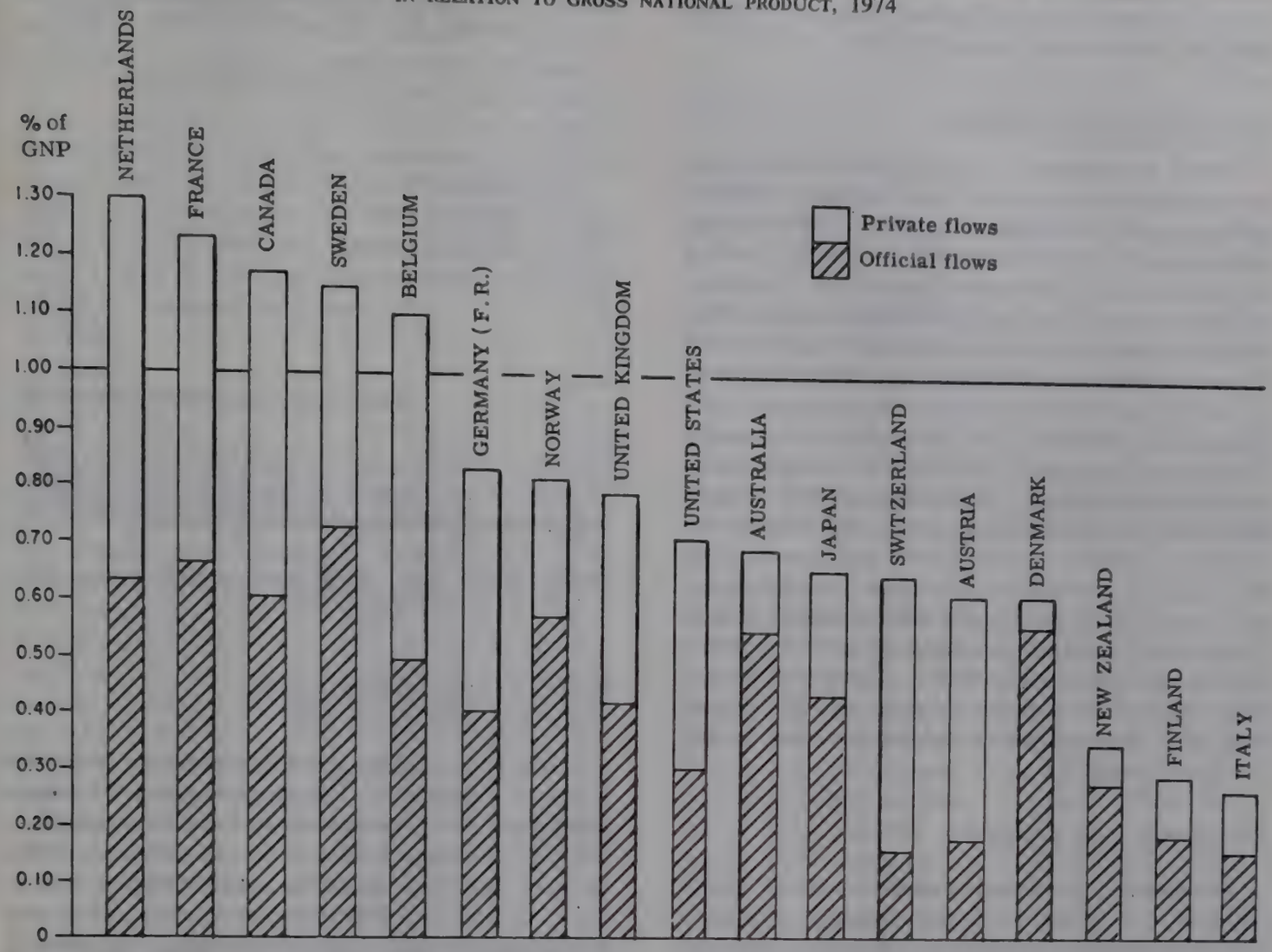
The volume of ODA grants increased by 25% over 1973 to $8 300 million and the share of grants in total ODA rose from 71 to 73%. About half of the increase was due to larger grants to multilateral agencies. As for the various components of bilateral grants, both technical assistance and food aid increased nominally, by 13% and 40% respectively. Technical assistance remained stagnant in real terms, however, while the volume of food aid granted rose, mainly through multilateral arrangements. Net concessional loans increased from $2 700 million to $3 000 million in nominal terms, although their share in total ODA declined from 29 to 27%.

TERMS OF DAC ASSISTANCE

In 1974 the over-all terms of official development assistance hardened for the first time in several years. Although grants were higher as a percentage of disbursements, the share of grants in new commitments (66%) was slightly smaller than in 1973. More significantly, loan terms of new commitments hardened as their grant element dropped from 65 to 60%.

The grant element of ODA also declined slightly to 86.8%, but still remained above the 84% target set in the 1972 Recommendations on Terms and Conditions of Aid, which was adopted by all DAC donor countries except Italy. Twelve countries complied with the target in 1974. Six (Belgium, Canada, New

FIGURE 1-5. — TOTAL NET FLOWS OF DEVELOPMENT ASSISTANCE OF DAC MEMBER COUNTRIES IN RELATION TO GROSS NATIONAL PRODUCT, 1974



SOURCE: *The OECD Observer*, 76, July/August 1975, Paris.

Zealand, Norway, Sweden and the United States) actually raised their grant element above the 1973 levels. Six others (Australia, Denmark, France, the Federal Republic of Germany, the Netherlands and the United Kingdom) maintained roughly the same high concessional levels as in 1973. The commitments of Finland and Switzerland were too small to be considered as having met the target. Austria and Italy sizeably increased their grant element, while Japan's ODA commitments declined from a 69.9% grant element in 1973 to 61.5% in 1974.

ASSISTANCE FROM OPEC COUNTRIES

During 1974 the members of OPEC largely overtook centrally planned countries as the second most important donor group. Total concessional (ODA) commitments from OPEC countries amounted to over $4 000 million in 1974, of which nearly $3 500 million was committed bilaterally and the remainder to multilateral agencies, in particular to Arab institutions. The total amount disbursed during 1974 was about $4 600 million. Official development assistance from OPEC countries in 1974 is estimated at around $2 500 million, a fivefold increase from the previous year and nearly 1.4% of their aggregate GNP. Thus, the share of OPEC contributions within the total ODA flows is estimated at as much as 22% compared to 4% in 1973. Bilateral assistance from OPEC countries was, however, given to a limited number of countries. Only four recipients — Egypt, India, Pakistan and Syria — received two thirds of OPEC's concessional aid in 1974. On the other hand, the MSA countries received more than 40% of their total bilateral 1974 commitments from OPEC. The financial terms of OPEC's concessional aid commitments appear to be less favourable than those of DAC countries. The total grant element was around 65% in 1974, as compared to 87% for DAC countries. In November 1975 the OPEC countries agreed to establish a $1 000 mil-

lion aid fund for the developing countries most seriously affected by the oil crisis. The fund will be under the direct management of OPEC.

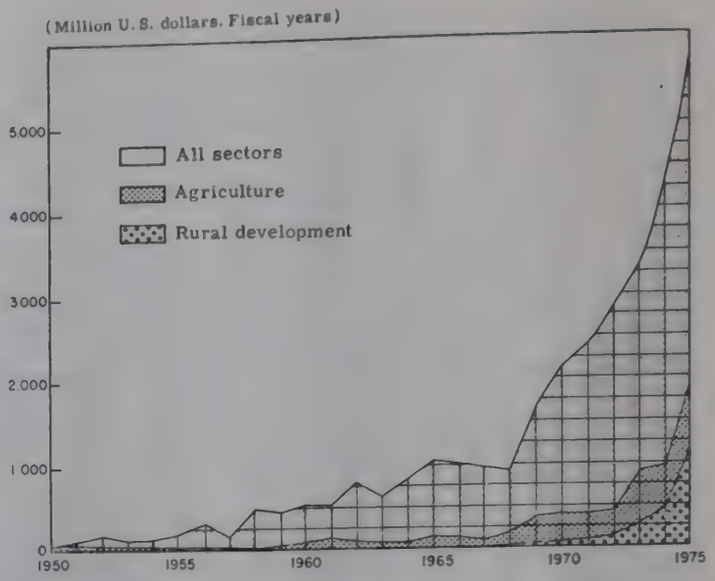
CENTRALLY PLANNED COUNTRIES

Official development assistance from centrally planned countries is believed to have remained at $1 100 million, roughly the same as in 1973. While a large proportion of this aid, perhaps half, is still allocated to Cuba and the Democratic Republic of Viet-Nam, a large number of other developing countries, particularly those in Africa, are financially assisted by China. A positive measure toward multilateralization of socialist aid was the decision taken in April 1973 by member countries of the International Investment Bank to set up a special fund of 1 800 million transferable roubles (about $1 300 million at 1973 rates of exchange) for development aid to non-socialist developing countries. Most of the aid provided by the U.S.S.R. and eastern European socialist countries is long-term state credit and is usually tied to specific projects in which equipment and services are supplied by the donor country. Grants constitute a minor part of the socialist countries' aid (little more than 5% in recent years) and are provided mainly for emergency relief.

THE WORLD BANK GROUP

The financial and technical operations of the World Bank Group continued to expand rapidly, with Bank and International Development Association (IDA) loan disbursements amounting to $3 021 million in the 1974/75 fiscal year, compared to $2 244 million in 1973/74. In 1974/75 total Bank and IDA commitments increased to nearly $5 900 million, of which about $1 600 were IDA credits. Of the loans committed to agriculture, totalling $1 858 million, one third were interest-free IDA credits (the Bank's interest rate is currently 8.5%). Again, agriculture's share was the largest, about 32% of the Bank's and IDA's total lending to all sectors (Figure 1-6). The Bank's operations will increase even further with the initiation of an important "Third Window" lending programme approved in June 1975. Under this new lending facility, the Work Bank is expected to provide, over a one-year period, up to $1 000 million in loans to nearly 50 "needy" countries, i.e. those with a per caput GNP of less than $375. Financial terms would be about midway between those of the Bank's normal "hard" loans and those of IDA's "soft" ones. Subsidized interest rates (4%) are to be provided by voluntary contributions from OPEC and affluent countries.

FIGURE 1-6. — WORLD BANK AND INTERNATIONAL DEVELOPMENT ASSOCIATION LOANS FOR ALL SECTORS, AND FOR AGRICULTURE AND RURAL DEVELOPMENT, 1950-75



SOURCE: World Bank, *World Bank Annual Report, 1975*, p. 16, Washington, D.C.

REGIONAL DEVELOPMENT BANKS AND OTHER SOURCES OF AID

Loans from regional development banks have also increased significantly. The Inter-American Development Bank (IDB), together with its Fund for Special Operations, disbursed a total of $1 110 million in 1974, or more than 25% above the record level achieved in 1973. A large part of this amount went to agriculture, which accounted for the greatest individual number of loans (13) extended during the year, to eight countries, and for the second largest loan volume ($228 million). The relatively less developed countries in the region accounted for $426 million (38%) of the total IDB disbursements, compared to $316 million in 1973. The IDB also continued detailed negotiations with Venezuela for the creation of a new fund equivalent to $500 million, to be used for loans in the region.

The Asian Development Bank approved 39 loans amounting to $548 million. The agricultural sector received higher priority with loans rising to $134 million, nearly triple the amount of 1973. Projects related to agriculture received 25% of total loans, compared to only 11% the previous year. In 1974, loans from the African Development Bank (ADB) showed a threefold increase from 1973 when the African Development Fund (ADF) came into operation. Of the total ADB/ADF loans of $135 million, $39 million (29%) were for agriculture. Although agricultural loans increased by about 60% in absolute terms above 1973, there was a considerable drop in

their relative share. The resources of the African Development Bank and Fund are still small compared with those of the other major regional banks, and particularly in relation to the enormous development needs of the continent. In addition, Africa's share in the over-all total of recorded net flows of resources to developing countries has continuously declined, from 35% in 1960 to about 18% in recent years.

Other aid included the IMF "Oil Facility," which was instituted in 1974 and renewed with wider coverage in 1975 to assist member countries with their balance of payments problems.

Development assistance to agriculture

More information is becoming available about the increasing flow of development assistance to agriculture. Provisional estimates recently provided by the OECD Development Assistance Committee give a fair indication of the extent of official development assistance to agriculture in 1973 and 1974. Total assistance from the 17 DAC member countries and the multilateral agencies (including those of the United Nations) amounted to about $2 370 million in 1973 and $3 230 million in 1974. These estimates are based on a broad definition of agriculture which also includes fisheries and forestry.

Agriculture's share in the total official aid commitments in 1973 was an average of 7.9% for DAC members and 25% for multilateral agencies. Taking the two together, it was just over 12%. The total value of official development assistance to agriculture was about $2 500 million in 1973 and $3 600 million in 1974, including assistance from the socialist, OPEC and other non-DAC countries (Table 1-9).

Technical cooperation commitments to agriculture by DAC members and multilateral agencies stood at roughly $360 million in 1973, and $430 million in 1974, or about 15% of total aid commitments to agriculture.

Capital assistance commitments to agriculture by DAC members and multilateral agencies were about $2 014 million in 1973 and $2 800 million in 1974. Over 60% of capital assistance to agriculture in 1973 was committed by the multilateral agencies. Two thirds of this amount was provided by the World Bank and one third by the three regional development banks.

The distribution of capital assistance commitments to agriculture by regions and categories is shown in Table 1-10. The distribution by categories of projects shows a heavy concentration on water development in all four regions.

In addition to the traditional bilateral programmes of aid to agriculture, consideration is now being given to the mobilization of new resources to expand assistance for agriculture at the multilateral level. It was for this purpose that the World Food Conference called for the creation of an International Fund for Agricultural Development (IFAD) to finance agricultural development projects. Progress made so far in this direction appears promising. An encouraging recent development was the announcement that the United States will directly contribute $200 million if other countries will provide the balance to cover a combined goal of at least $1 000 million.

TABLE 1-9. — ESTIMATED FLOW OF OFFICIAL ASSISTANCE TO AGRICULTURE, 1973 AND 1974

	1973	1974
	.... *Million U.S. dollars*	
DAC bilateral and multilateral agencies		
Capital assistance	2 014	[1] 2 800
Technical cooperation	[2] 358	[2] 430
Socialist countries [3]	120	124
OPEC countries [3]	44	200
Others [4]	20	25

SOURCE: *Review of FAO field programmes 1974-75*. Rome, FAO, 1975, p. 68.

[1] Preliminary. – [2] Includes estimates for UNDP. DAC data for 1974 are projected from 1973 figures on the basis of the estimated increase in capital assistance. – [3] Assumed as 8 % of the estimated total aid commitments to the developing countries as in the case of DAC bilateral aid. – [4] Technical cooperation among developing countries not covered elsewhere, based on very rough estimates.

The most seriously affected countries

The concept of "most seriously affected" (MSA) countries is defined in United Nations General Assembly Resolution 3202 (S-VI) passed by the Sixth Special Session in May 1974. It relates to the group of poor countries which since late 1973 have been hardest hit by the sharp increase in prices of essential imports such as food, oil and fertilizers. Without financial help, these countries would not have been able to cover their vital import needs and the result would have been a further deterioration in living standards below their already low levels.

The following criteria were adopted by the Special Session to identify the MSA countries:

(*a*) low per caput income as a reflection of relative poverty and low levels of development;

(*b*) sharp increase in import costs of essentials relative to export earnings;

(*c*) high ratio of debt servicing to export earnings;

(*d*) insufficiency in export earnings and unavailability of exportable surplus;

(*e*) low level of foreign exchange resources or their inadequacy for requirements;

(*f*) adverse impact of higher transportation and transit costs;

(*g*) relative importance of foreign trade in the development process.

As a first step toward effective assistance, the Special Session set up the United Nations Emergency Operation (UNEO), which functioned from 1 May 1974 for one year collecting and distributing emergency aid totalling $230 million in favour of the MSA countries. To identify recipients, an interagency technical group created by the Emergency Operation undertook an analysis on the basis of the aforementioned criteria, focusing upon the over-all balance of payments situation and outlook. Detailed projections on trade and current capital accounts were made to determine expected balance of payments deficits for all low-income developing countries.

Thus, 32 countries were given MSA status by August 1974. Ten more countries were added to the list between December 1974 and May 1975, bringing the total number of MSA countries to 42.[12] Of these, 27 countries are in Africa, 10 in Asia and the Pacific, four in Central and South America, and one in Oceania. All these countries had a per caput GNP of less than $400 in 1971.

[12] Afghanistan, Bangladesh, Burma, Burundi, Cambodia, Cameroon, Cape Verde Islands, the Central African Republic, Chad, Dahomey, Democratic Yemen, Egypt, El Salvador, Ethiopia, Ghana, Guinea, Guinea-Bissau, Guyana, Haiti, Honduras, India, Ivory Coast, Kenya, Laos, Lesotho, Madagascar, Mali, Mauritania, Mozambique, Niger, Pakistan, Rwanda, Senegal, Sierra Leone, Somalia, Sri Lanka, Sudan, Tanzania, Uganda, Upper Volta, Western Samoa, Yemen Arab Republic.

TABLE 1-10. — CAPITAL AID COMMITMENTS TO AGRICULTURE[1] FROM DAC MEMBERS AND MULTILATERAL AGENCIES, 1973 AND 1974

Category	Africa		Asia and Far East[2]		Latin America		Near East and Mediterranean[3]		Total	
	1973	1974	1973	1974	1973	1974	1973	1974	1973[4]	1974[5]
	Million U.S. dollars									
1. Crop development	54	17	11	10	—	7	—	—	68	33
2. Animal husbandry	50	67	25	84	66	2	—	7	142	159
3. Fisheries	—	—	29	42	9	43	4	—	37	88
4. Forestry	6	20	—	24	4	13	—	—	11	57
5. Water development	55	79	65	307	118	265	123	206	364	856
6. Land development and reclamation	6	44	39	114	8	4	—	1	41	163
7. Agricultural services[6]	44	33	175	28	—	28	—	46	219	138
8. Agricultural development banks	5	—	6	—	—	—	—	5	15	5
9. Storage	7	—	26	—	13	—	—	—	45	—
10. Supply of means of production[7]	—	1	159	217	—	1	—	20	210	238
11. Rural development	15	18	—	—	—	21	—	45	15	39
12. Unspecified[8]	44	91	114	118	244	146	115	—	510	428
Total narrow definition (1 to 12)[1]	284	369	649	943	463	529	242	329	1 677	2 204
13. Manufacturing and maintenance of agricultural means of production[9]	—	2	—	37	—	—	—	92	—	130
14. Agro-industries	29	78	58	30	11	22	4	—	101	130
15. Infrastructure and transport for agricultural development[10]	97	94	51	15	47	—	3	3	191	112
16. Regional development projects	—	21	—	12	1	12	9	12	13	56
17. River development projects	19	—	4	—	—	—	—	—	23	—
Total broad definition (1 to 17)[1]	429	563	762	1 035	522	562	258	436	2 114	2 630

SOURCE: *Review of FAO field programmes 1974-75. Annex 12.* Rome, FAO, 1975.

NOTE: Columns and rows may not add up to totals shown because of rounding of individual items.

[1] According to DAC statistics, categories 1 to 12 are included in a "narrow definition" of the agricultural sector. Categories 13 to 17 are added in the "broad definition". – [2] Including Afghanistan, Iran and the Democratic Republic of Viet-Nam (1974 only). – [3] Including Algeria, Greece (1974 only), Israel (1974 only), Morocco, Tunisia and Yugoslavia. – [4] Includes amounts for which a geographical and sectoral breakdown was not available. – [5] Data for 1974 are incomplete. – [6] Includes agricultural education and training, extension services, research, administration, planning, marketing, feasibility studies, topographical surveys, land reform and cooperation. – [7] Includes fertilizers, pesticides, seeds, agricultural tools and equipment not included elsewhere. – [8] Items which cannot be classified specifically under categories 1 to 11. – [9] Including aid for the establishment of plants for the production of fertilizers, pesticides, agricultural equipment, animal feedstuff production. – [10] Notably feeder roads.

While the Emergency Operation was formally terminated on 1 May 1975, Resolution 3202 (S-VI) had also established a Special Fund under United Nations auspices. Through voluntary contributions from industrialized countries and other potential contributors, the Fund is to provide emergency relief and development assistance. It is expected to continue the work of UNEO and extend its scope to cover the MSA countries' development needs. Other sources such as the IMF "Oil Facility," the World Bank "Third Window," and the International Fund for Agricultural Development (when it is established), would also contribute to meet the financial needs of MSA countries.

A common characteristic of the MSA countries is the importance of agriculture in their economies. For the group as a whole, agriculture provides employment to approximately 69% of the population, and contributes about 40% of the GNP. These countries are also substantial importers of foodstuffs, especially cereals. Of the total imports by developing countries in 1974, MSA countries accounted for approximately 36%, and the share of foodstuffs in their total imports rose from 22% in 1972 to as much as 35% in 1974.

Agricultural performance in the MSA countries is generally weaker than in the remaining group of developing countries. During the period 1961-74, the annual growth rate of food production stood at only 2.0% for the MSA countries, while population increased by 2.4% annually. Consequently, per caput food supplies in these countries remained virtually stagnant or declined. In fact, several MSA countries, especially Kenya, Lesotho, Madagascar and Mali in Africa, Cambodia in Asia, and Guyana in Latin America, had become net importers of cereals in the early 1970s after being net exporters in the early 1960s.

The year 1974 brought further serious economic difficulties for MSA countries. The world-wide economic recession substantially inhibited the expansion of their exports while inflation and sharp price increases raised their import charges. Agricultural imports were higher not only in terms of value, but also in volume. For instance, cereals imported rose by about 2 million tons as production declined by 14 million tons between 1973 and 1974. As a result, the foreign debt burden of these countries increased substantially in 1974.

During 1975 the food outlook in MSA countries became more favourable, mainly on account of good weather, especially in Asia. The output of cereals, on preliminary estimates, is expected to recover by about 16 million tons, and cereal imports are consequently unlikely to increase. However, agricultural export earnings are likely to deteriorate sharply in 1975/76, in part due to the continued recession in industrialized countries and a sharp decline in prices from their peaks in 1974.

As a consequence, it has been estimated[13] that the balance of trade deficit of the 42 MSA countries will amount to $10 750 million in 1975 and the financing gap to $4 400 million. If the flow of emergency financial assistance continues at the same level as in 1974, the residual financing gap will be about $3 000 million, as against $1 700 million in 1973. This suggests that in 1975/76 the financial assistance needs of MSA countries will not only continue, but will even grow more acute despite some improvement in domestic food production. New concessionary measures would therefore be urgently needed to finance the residual gap so that these countries' debt burden does not reach an intolerable level.

[13] In the Secretary-General's report on the United Nations Emergency Operation. Document A/10201 dated 21 August 1975.

Agricultural production requisites

Energy supplies

The sharply higher cost of energy supplies continued to affect agriculture throughout 1974-75, and with a 10% increase in the price of oil effective from 1 October 1975 until 30 June 1976, there is little hope that the immediate situation will improve significantly.

World energy consumption declined in 1974 for the first time in almost 30 years: total consumption fell by 3% while oil consumption fell by 3.2%. This drop in consumption was almost completely confined to the market economies and was largely due to their efforts to cut down on domestic demand by passing the oil price increases of late 1973 directly on to consumers. Consumption in western Europe fell by 9% and in North America by 6%. In contrast, consumption in eastern Europe, the U.S.S.R. and China increased by 6.5% overall.

The decrease in consumption in the market economies has had significant detrimental effects on agriculture, particularly in the associated fertilizer and pesticides industries, where shortages of feedstocks of oil and natural gas due to competition over supplies have cut back production, which had already fallen short of world demand in 1973. Prices have been driven up to unprecedented levels, and farmers in many countries using energy-intensive farming

methods such as highly mechanized, irrigated and greenhouse cultivation have sought to economize by adopting less intensive but also less productive techniques. Higher transport costs have also increased the cost of all inputs, and in particular have adversely affected dairy and truck farmers.

In developed countries, higher energy costs have also had a significant impact on food processing industries, which are heavy energy users. In the United States, for example, food processing (including freight) accounts for about 39% of the total food-related energy consumption, compared with 24% for farm production and 37% for refrigeration and cooling. [14]

While the increased costs of energy-based inputs were in part offset during 1974 by high world commodity prices, these fell sharply in the first half of 1975, further inducing farmers to cut down on inputs and change cropping patterns.

Agriculture accounts for only a small proportion of total world energy use: in the United States, where farmers use more energy than anywhere else, the sector accounts for only 2.5% of total national consumption (excluding human, animal, and solar energy). This percentage includes not only direct on-farm usage, but also energy used in the manufacture of inputs such as machinery, feeds, and fertilizers. In many developing countries, where labour is provided largely by animals and humans, the percentage is much smaller. However, although these countries are in theory protected to a greater degree from the effects of the energy crisis, they are generally the same countries where population growth makes high and continuous growth of agricultural output imperative. A high proportion of annual incremental growth in agricultural output in these countries is due to increased use of energy-based inputs (machinery, fertilizers and pesticides), so any reduction in their use cannot fail to bring about corresponding declines in food production. Any such change threatens not only farmers' levels of living, but also the economic position of many developing countries, especially those which must import a significant proportion of their fuel, fertilizer and pesticide, which rely heavily on agricultural exports for their foreign exchange earnings, and which are already unable to meet their food requirements.

Although research is currently underway to reduce usage of fossil fuel-based energy in the farming sector, it would be unrealistic to assume that demand will drop in the near future, with the possible exception of such highly developed countries as the United States, where significant savings could be made in the use of energy in food distribution and processing.

[14] J.S. Steinhart and C.E. Steinhart, "Energy use in the United States food system," *Science*, 183, April 1974.

Fertilizers

World production of fertilizer in 1973/74 (year ending 30 June) in terms of the three primary plant nutrients (N, P_2O_5, K_2O) amounted to about 88 million tons (Figure 1-7), 8% more than the previous year. Meanwhile, consumption of fertilizers rose by 8.3% to reach approximately the same level as production. In 1972/73 consumption and production had also been very tightly balanced, and prices had begun to show an upward trend. By mid-1974, the fertilizer supply situation worsened considerably and the shortfall in relation to projected demand amounted to about 1 million tons of plant nutrients. World market prices rose very sharply, tripling or even quadrupling over 1971/72 levels. Furthermore, in the fertilizer-exporting countries significant differences arose between domestic and export prices, which seriously affected many developing countries.

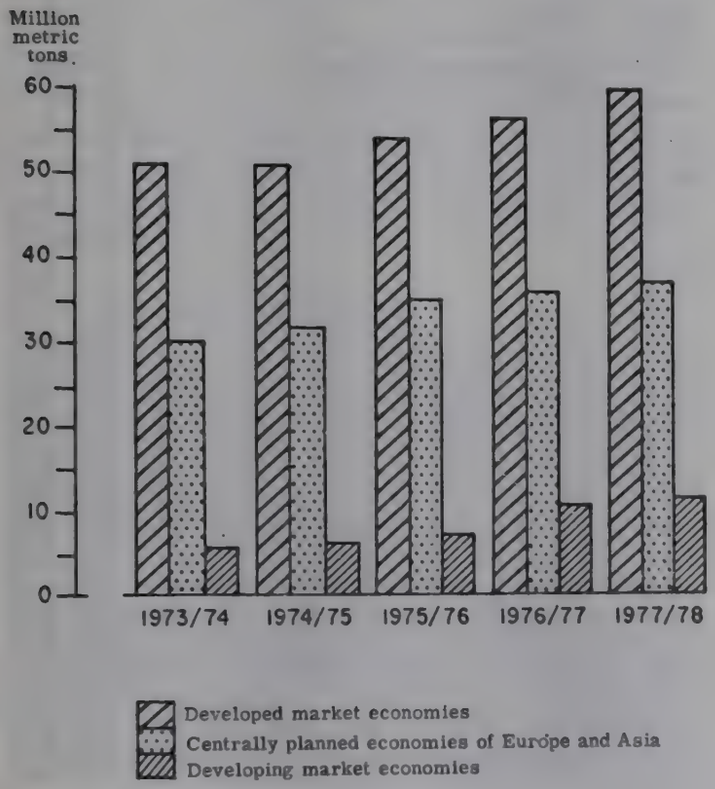
Since the last quarter of 1974, following a slackening of demand for fertilizers, market prices have declined and the difference between domestic and export prices has been narrowed. By the end of June 1975, prices were down by about one third from their peak levels (e.g. urea from $320 to $220 per ton), but were still very high compared with 1971/72 or even 1972/73. Prices may decline further, although they are not likely to approach the extremely low levels of 1971/72. Meanwhile, production costs have increased considerably due to inflation, including the steep increases in the costs of raw materials and feedstocks.

The supply/price developments in the fertilizer sector in 1974 had particularly severe repercussions in a large number of developing importing countries. Out of a total import requirement of 2.7 million tons of plant nutrients in 1974/75, the 42 MSA countries imported on a commercial basis about 1.85 million tons and received 327 000 tons through bilateral assistance and some 73 000 tons through the International Fertilizer Supply Scheme, leaving an estimated shortfall of about 450 000 tons of plant nutrients. In 1975/76 the total import requirements of the MSA countries are estimated to be 2.95 million tons of plant nutrients. Assuming that these countries can manage to import commercially the same volume as in 1974/75, the gap remaining would be 1.10 million tons. Unless bilateral and multilateral assistance for fertilizers is increased over 1974/75 levels, there will remain an uncovered gap of just over 700 000 tons for these countries.

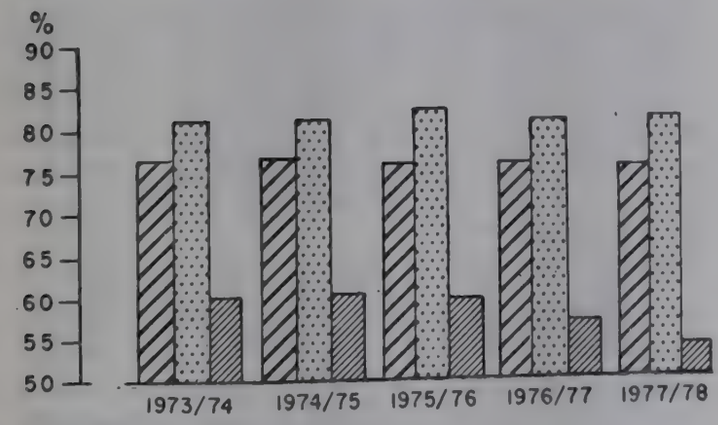
Projections of fertilizer supply prepared by the FAO/United Nations Industrial Development Organization (UNIDO)/World Bank Working Group on Fertilizers indicate that the supply crisis of the past three years is expected to become less severe, and that longer term supply prospects are reasonably favourable through at least 1980/81 due to the substantial firm commitments already made for new capacity. World-wide installed capacity for all three plant nutrients is expected to increase from 119 million tons in 1974/75 to 152 million tons by 1977/78 (Figure 1-7) and to 176 million tons by 1980/81. For the developing countries as a group, the projections indicate an increase of 21.4 million tons of installed plant nutrient capacity. Also, during the next two or three years decisions might still be made to install additional capacity which could be on stream by the early 1980s.

FIGURE 1-7. — FERTILIZER PRODUCTION AND UTILIZATION RATES OF INSTALLED CAPACITY IN DEVELOPED MARKET ECONOMIES, CENTRALLY PLANNED ECONOMIES, AND DEVELOPING MARKET ECONOMIES, 1973/74 TO 1977/78 [1]

A - PRODUCTION OF PLANT NUTRIENTS



B - CAPACITY UTILIZATION



SOURCE: FAO.
[1] 1974/75 estimated. 1975/76 to 1977/78 projected.

Despite increases in domestic production in the developing countries of Africa, Latin America and the Far East (Figure 1-8), the Working Group's projections indicate that if these countries wish to maintain even their recent unsatisfactory food production growth rate in 1980/81, their net import requirements for nitrogen fertilizers for that crop year will be about 2.3 million tons, compared with 3.1 million tons in 1974/75. Their net import requirements for phosphate fertilizer (excluding Africa, which is a net exporting region) were forecast to increase from 1.45 million tons to 1.73 million tons.

The developing countries will have to accelerate their rate of growth of food production if the number of severely malnourished people in the world is not to increase, and the fertilizer projections carried out by the Working Group based on current growth rates are to be reexamined in this light.

MAIN ELEMENTS AND OBJECTIVES OF WORLD FERTILIZER POLICY

The expansion of fertilizer use on the scale necessary to achieve higher rates of food production requires improvements in the structure of the world fertilizer market. At present it suffers from a tendency to cyclical patterns of production which leads to the kind of difficulties outlined above — temporary shortages and high prices, followed by gluts and depressed prices. A system of coordinated international planning is necessary to avoid, as a minimum, the worst excesses of this production cycle. A second structural problem is the heavy dependence of developing countries on imported supplies. Such dependence makes these countries particularly vulnerable to fluctuations in world supplies and prices. A third problem is the inadequate infrastructure for handling and distribution, and poor marketing and credit facilities at the farm level.

Major elements of a world fertilizer policy should include:

(*a*) ensuring a balanced expansion in both the supply and utilization of fertilizers in line with food production objectives;

(*b*) avoiding cyclical imbalances between supply and demand;

(*c*) ensuring that fertilizer prices are stabilized at reasonable levels;

(*d*) enabling developing countries to obtain fertilizers they need for their food and agricultural production;
(*e*) promoting the most efficient and effective use of fertilizers through appropriate policies and programmes to stimulate fertilizer consumption in line with agricultural production objectives; and
(*f*) building up efficient fertilizer marketing and credit systems.

To achieve these objectives, attention will have to be focused on short-term measures in order to meet immediate shortages and on long-term measures in order to promote a general expansion of production and consumption of fertilizers.

The problem in the short term is to ensure that developing countries, with their very limited resources, obtain fertilizers they need so that their food production prospects do not suffer. The financial problems of many developing importing countries persist and have recently worsened even though the fertilizer supply situation is easing. Meeting this problem requires:

1. *Bilateral fertilizer aid*

Bilateral aid has played a major role in augmenting the supplies of fertilizers to developing countries and it will continue to be needed by many of them, especially the MSA countries. In planning their aid programmes, donor countries should therefore keep in mind the needs for fertilizer aid and give it sufficiently high priority.

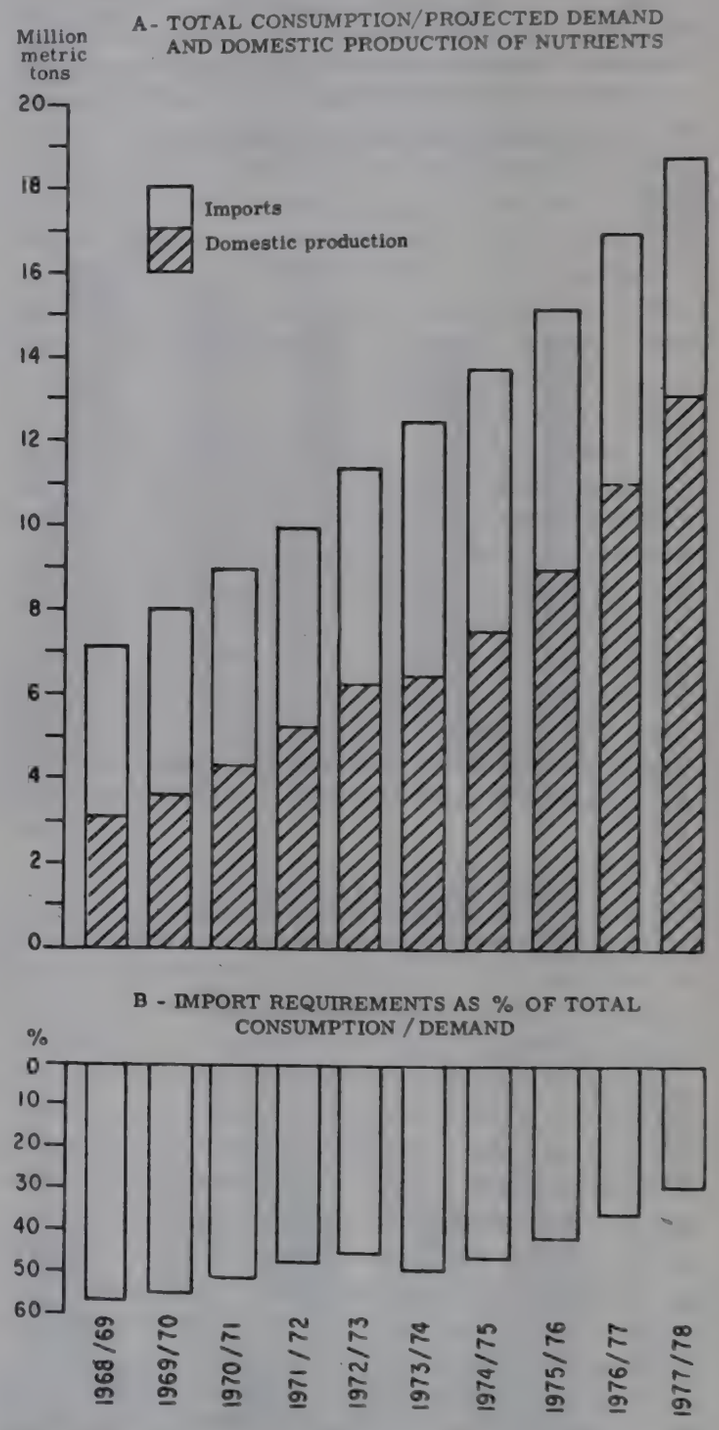
2. *Strengthening the International Fertilizer Supply Scheme*

The multilateral assistance for fertilizers through the International Fertilizer Supply Scheme (IFS) contributed to alleviating the MSA countries' problem of meeting fertilizer requirements in 1974/75. Fertilizer import requirements of the 42 MSA countries for 1975/76 amount to about 3 million tons of plant nutrients valued at $1 124 million at June 1975 prices ($624 million higher than at 1972/73 prices). As stated earlier, fertilizer prices are expected to decline further, but the additional cost to the MSA countries (over 1972/73 prices) is still likely to be beyond their means. The IFS provided just under one fifth of the fertilizer aid in 1974/75. To cover a similar share of the additional financial burden to the developing countries, the resources of the IFS will have to be augmented by additional pledges well over those of 1974/75 if the fertilizer requirements of the MSA countries are to be fully met.

3. *Improving the efficiency of fertilizer plants*

An important way of reducing the fertilizer import requirements of developing countries would be for these countries to utilize existing capacity of their fertilizer plants more fully (Figure 1-7). The Working Group on Fertilizers has identified a number of countries requiring technical and financial assistance for improving the efficiency of their fertilizer plants, and work to improve operations has already begun. The financial assistance provided through the IFS can also help countries to obtain feedstock and raw

FIGURE 1-8. — FERTILIZER CONSUMPTION/PROJECTED DEMAND, DOMESTIC PRODUCTION AND IMPORT REQUIREMENTS IN DEVELOPING COUNTRIES,[1] 1968/69 TO 1977/78 [2]



SOURCE: FAO.

[1] Excluding the Asian centrally planned economies. — [2] 1974/75 estimated. 1977/78 projected.

materials, as their lack has been a major factor in low rates of capacity utilization in some cases.

In the longer term, there is need for:

4. *An expanded Fertilizer Intelligence System*

A more reliable means is needed to project long-term fertilizer requirements on different assumptions, and to anticipate possible shorter term imbalances between supply and demand. While FAO and other organizations already had some arrangements for collecting and analysing fertilizer information, steps have been taken to harmonize these activities in order to unify the available statistical information compiled by the various agencies concerned. A Fertilizer Data Centre has been established in FAO following the recommendation made at the Second Session of the Commission on Fertilizers and endorsed by the FAO Council. The Data Centre will provide information to the Global Information and Early Warning System on Food and Agriculture, the IFS, and the Interagency Working Group on Fertilizers. Greater attention will also be given to the collection and analysis of price information.

5. *Action on price instability*

Extreme fluctuations in fertilizer prices since 1971/1972 and large differences between production costs, prices paid by farmers in the fertilizer exporting countries, and export prices, have led to considerable problems for many farmers in developing countries. They have slowed down the growth in fertilizer consumption, particularly in importing developing countries. But the excessively low prices of the late 1960s were also disruptive, as they discouraged an adequate level of investment in fertilizer plants. The causes and effects of price instability as well as of price differentials between domestic and export markets require careful analysis so that ways and means of ensuring greater price stability in the interests of both exporters and importers can be suggested. For countries which import all or a large portion of their fertilizers, long-term contracts may be beneficial with a pricing formula tied to the domestic prices in the exporting countries. Such an arrangement would result in fertilizer exporters assuming a role similar to that of a public utility in providing the import requirements of developing countries.

6. *New production capacity in developing countries*

Some of the developing countries have been making steady progress toward the development of domestic fertilizer industries. The new production capacity scheduled to come on stream in the developing countries between mid-1975 and 1980/81 is larger than that in either the developed market economies or the centrally planned economies. Nevertheless, there are still major opportunities for further expansion, including cooperative ventures, especially where unexploited supplies of one or more of the fertilizer raw materials and feedstocks exist in developing countries, and where local or regional markets justify such investments.

The FAO Council has concurred with the Fertilizer Commission in its request that the Consultative Group on Food Production and Investment in Developing Countries, in collaboration with FAO, UNIDO and the World Bank, investigate and promote additional possibilities of expanding fertilizer production in developing countries, giving particular attention to plant location in countries possessing domestic raw materials such as phosphate, gas or oil and/or large markets and the possibilities for cooperative ventures, and to the means required for the mobilization of the necessary financial and technical resources. A comprehensive study of capacity requirements and plant location is an essential part of this work.

7. *Improved fertilizer use and marketing*

A major constraint on the development of fertilizer use in many countries is poor supporting facilities, e.g. extension services, marketing, storage and credit, as well as the lack of appropriate pricing policies. Such shortcomings will require the continued assistance of FAO, other United Nations agencies and interested donor countries if major improvements are to be made. Part of their efforts are needed to encourage farmers to make more and better use of locally available organic fertilizers.

Pesticides

The pesticide supply situation remained extremely tight throughout 1974 and early 1975, with demand exceeding world capacity by 10 to 30% and prices rising to as much as four times 1973 levels for some individual products. The situation eased a little in the first half of 1975 as commodity prices and price resistance cut back demand. However, with almost all factories working to capacity and inventories depleted, the supply situation is still precarious; spot shortages and major delivery delays continued, and no substantial improvement is expected until 1977.

The current shortage is largely attributable to lagging production capacity, as demand since 1971 has far outstripped projected utilization rates, especially in the developing countries. At the same time, output has been curtailed by shortages of petroleum-based chemicals and other feedstocks, by restrictive

legislation applying to the manufacture and sales of certain products, and by the closure of many smaller and older plants because of cost inflation.

The effects of the current shortage have been most serious in the developing countries, which are almost totally dependent on imports of preparations for domestic formulation and of finished products. Many of these countries have been unable to meet their requirements because of supply shortages and lack of foreign exchange. Moreover, legal restrictions on production in producing countries apply almost exclusively to broad-spectrum pesticides or "commodity chemicals" (e.g. aldrin, dieldrin and DDT), which form more than half of developing country usage, and the resultant pressure on supplies of these traditionally cheap products pushed their prices up drastically during the year. With estimated crop losses due to pests in developing countries reaching 50% or more for certain crops in given areas, the pesticide shortage can be expected to have serious damaging effects on harvests in the coming year.

While the current pesticide shortage is expected to be relieved in 1977 when new capacity comes on stream, there remains the longer term problem of assuring supplies of suitable pesticides to the developing countries at prices that farmers can afford. These countries, which currently account for only 7% of total world pesticide use, will need to increase their share of world consumption if their future food needs are to be met. However, their relative position in the world market cannot be expected to improve in the near future, since much of the planned new capacity is to be added in the exporting countries, and is geared to developed country requirements such as the production of target-specific and non-persistent pesticides which are expensive and require sophisticated methods of application. Not only is the production of established pesticides lagging, but the development of new pesticides suited to crops and conditions in the developing countries is being overlooked because the small or uncertain markets these countries often represent do not justify the high development costs, currently $10 million for each new product on the market.

Following Resolution X of the World Food Conference, the *Ad Hoc* Government Consultation on Pesticides in Agriculture and Public Health took place in Rome in April 1975. The Consultation was attended by 53 countries, seven international organizations including FAO, the World Health Organization (WHO), UNIDO and the United Nations Environment Programme (UNEP), and representatives of the pesticide industry from the FAO/Industry Cooperative Programme and the European Group of National Pesticides Manufacturers' Associations (GEFAP). The recommendations made at this Consultation were discussed at the first session of the World Food Council (WFC) in Rome in June 1975. Four sets of recommendations were adopted:

1. Establishment of an improved supply/demand information system. FAO would act as a clearing house to bridge identified gaps.
2. Expansion of the FAO Emergency Fund to $1 million, and of its scope to cover all major endemic crop pests. Also recommended was the provision of an additional $5 million by donor countries for necessary equipment, materials and manpower.
3. Action by United Nations agencies, donor countries and industry to increase pesticide manufacturing and formulating capacities in developing countries.
4. Establishment of an inter-agency central coordinating group within FAO to monitor and assist in strengthening national plant protection services.

Meanwhile, by October 1975 the IFS had supplied pesticides and equipment to nine countries at a total cost of $2.8 million. These operations will be continued in 1975/76.

Fisheries

Production and trade [15]

After falling in 1972 and showing little change in 1973, world fishery production, measured by the weight of catch, rose in 1974 by some 6% (Table 1-11). This was mainly due to the recovery in low unit-value anchoveta production in Chile and Peru, and the continued rapid growth in catches from the world-wide operations of vessels from the U.S.S.R. and other centrally planned countries. Much of the increase in the world catch in 1974 was of fish used for reduction to fishmeal and oil, but landings for direct human consumption also rose and were some 1.5 million tons higher than in 1973.

Although information for all countries is not yet available, present indications are that the commercial catch of developing countries increased by some 10% in 1974. Most of this was due to the improved catches

[15] For a detailed account of the fisheries situation, see FAO, *Yearbook of fishery statistics, 1974*, Vol. 36, Rome, 1975.

TABLE 1-11. — ESTIMATED WORLD CATCH OF FISH, CRUSTACEANS AND MOLLUSCS, 1970 TO 1974 [1]

Region	1970	1971	1972	1973	1974 [2]	Change 1973 to 1974
	Thousand metric tons					*Percent*
DEVELOPED MARKET ECONOMIES	26 270	26 420	26 650	27 530	27 580	—
Western Europe	10 990	10 990	11 220	11 370	11 370	—
North America	4 170	4 110	3 820	3 830	3 770	–2
Oceania	160	180	180	190	190	—
Other developed market economies [3]	10 950	11 140	11 430	12 140	12 250	+1
EASTERN EUROPE AND THE U.S.S.R.	8 240	8 410	8 870	9 820	10 570	+8
Total developed countries	34 510	34 830	35 520	37 350	38 150	+2
DEVELOPING MARKET ECONOMIES	27 490	26 740	21 290	19 960	11 960	+5
Latin America	15 550	14 010	7 640	5 230	7 450	+42
Far East [4]	8 430	3 990	9 380	10 360	11 300	+7
Near East [5]	620	620	630	710	730	+3
Africa [6]	2 780	2 860	3 380	3 370	3 430	+2
Other developing market economies [7]	110	260	260	290	300	+3
ASIAN CENTRALLY PLANNED COUNTRIES	7 970	8 630	8 670	8 740	8 740	—
Total developing countries	35 460	35 370	29 960	28 700	31 700	+10
World	69 970	70 200	65 480	66 050	69 850	+6

NOTE: Figures refer to the weight of the catch in metric tons. The annual changes in percentage terms may therefore differ considerably from those in Table 1-1 where the quantities of production are weighted by the unit values, as indicated in the explanatory note on page *x*.

[1] Including aquatic plants and animals other than whales. – [2] Preliminary. – [3] Israel, Japan, South Africa. – [4] Excluding Japan. – [5] Excluding Israel. – [6] Excluding South Africa. – [7] Including developing countries in North America and Oceania.

of Chile and Peru, but a number of other countries also had better catches, and totals for all the main developing regions will be higher than in 1973. In the Far East, the increase was mainly due to larger catches by the Republic of Korea and India. Apart from increased production from aquaculture, catches by China in the East China Sea are also believed to have increased substantially in 1974. The gain in production in Africa seems likely to have been relatively modest; both Senegal and Zaire recorded increased catches, but there were sharp falls in both Angola and Morocco, mainly of species used for reduction to fish meal and oil.

Catches by developed countries other than the U.S.S.R. were in total marginally lower in 1974. Only five of the major producers (Denmark, the Federal Republic of Germany, Iceland, South Africa and the United States) increased their landings. Much of the increase was in species used for reduction to fishmeal, as for the developing countries. However, higher catches by the above five countries were more than offset by falls in the catches of other countries; landings by Norway and Portugal, for example, were sharply lower, and the catch by Japan failed to increase substantially for the first time in many years. A notable feature of production in the north Atlantic was the continued decline in the catches of herring, which have now fallen from their high point of over 4 million tons in the mid-1960s to little more than 1 million tons in 1974. Prospects for any substantial recovery in the north Atlantic herring fisheries in the immediate future are poor.

The generally favourable economic conditions enjoyed by many of the world's fisheries in 1973 were not maintained during 1974. The fishing industry in most developed countries was caught between rapidly rising costs and a slackening in demand; the decline in consumption was due in part to the decline in the demand for animal protein products generally, but fish consumption was also adversely affected by the abundant supplies and the highly competitive prices of meats. The profitability of fishing operations in the first three quarters of 1975 generally worsened, leading to strong pressure by the industry in most developed countries for government assistance, which in many cases was forthcoming.

The increases in cost have been due not only to rises in the price of fuel and of inputs based on petro-

chemicals such as netting, but also to substantial rises in labour costs and the cost of containers and packaging. In developing countries where fishing is organized on industrial lines, the industry has run into difficulties similar to those experienced in the developed countries. However, these problems have probably been less severe over a wide production area in the developing world where processing is relatively simple, and the impact of labour costs will have been less. Nevertheless, there can be no doubt that the higher costs of fuel, gear and imported capital equipment has had a serious effect not only on the profitability of current operations, but also on mechanization programmes and the development of the industry generally.

Influenced by poor market conditions, international trade in fishery commodities for direct human consumption was rather sluggish throughout 1974 (Tables 1-12 and 1-13). Trade in ground fish products fell by over 10% and shrimp exports registered little or no increase, mainly owing to a severe cutback in Japanese buying. Consequently, imports of fish for direct human consumption by the principal importing countries fell in 1974 compared with the previous year. Nevertheless, a number of countries managed to increase their exports of fishery commodities for human consumption, notably the U.S.S.R., which exported fresh and frozen fish accounting for 23% of total world trade in these commodities. Among the products to show an increase in trade was tuna, both canned and frozen, the U.S. market in particular absorbing some 10% more imported raw tuna and more than 50% more canned tuna than in 1973.

A characteristic of recent years has been the severe shortages in supply and rapidly rising prices in the markets for fishmeal. In 1974 world fishmeal production increased quite sharply due to the higher output of Chile and Peru in particular, and that of other major producers; Canada, Denmark, Iceland and the United States also produced more meal than in 1973. Reflecting this expanded output, the quantity of meal entering international trade also rose in 1974. A large part of this increase went to eastern Europe, which is now the largest and fastest growing market for fish meal. Greater availability inevitably led to a decline in prices for meal, from over U.S.$600 per ton c.i.f. Hamburg in January 1974 to a little under $300 at the beginning of 1975, and prices have since fallen further. Abundant supplies of soybean meal were a contributory factor, but this very sharp fall in price for fishmeal, associated with what was only a moderate increase in supply, indicates some uncertainty regarding the future long-term position of fishmeal in the compound feed market. The prospects for the more immediate future must also be viewed with some caution. In the season from March to May 1975, Peruvian landings of anchoveta were reported as being some 3 million tons, or some three quarters of the total production in 1974 and half the 6 million ton target catch for 1975.

Catching capacity again increased in 1974 in response to previous good results. In the OECD countries, which account for approximately two thirds of world tonnage in the 100-500 gross registered tons (GRT) category, construction of vessels in this group was maintained at recent growth rates, i.e. 7% per annum, although for the larger vessels the rate of increase was only 2 to 3%. Within the category of the largest vessels (including factory ships) of over 2 000 GRT, building was maintained at previous rates by the U.S.S.R., but not by other countries; the U.S.S.R. now accounts for some 80% of all vessels in this category. More recently, there has been a widespread downturn in new building, even though a growing number of governments is offering financial assistance for the construction of new vessels. Given the overcapacity in the fleets of many developed countries, some contraction in vessel numbers would seem to offer the possibility of long run economic benefits, even if in the short run the process of contraction may cause individual hardship and political embarrassment to governments.

Policies and other issues

International fisheries policy issues were again overshadowed by questions of national jurisdiction at the Third Session of the Third United Nations Con-

TABLE 1-12. — INDICES OF VOLUME, UNIT VALUE AND TOTAL VALUE OF WORLD TRADE IN FISHERY PRODUCTS, 1970 TO 1974 [1]

	1970	1971	1972	1973	1974 [2]	Change 1973 to 1974
	1961-65 average = 100					*Percent*
Volume	130	135	149	148	149	+1
Average unit value	137	153	166	233	258	+11
Value	179	206	248	331	364	+10

[1] Excluding China and other Asian centrally planned economies. – [2] Preliminary.

TABLE 1-13. — INDICES OF THE VALUE OF FISHERY EXPORTS BY REGION, 1970 TO 1974

Region	1970	1971	1972	1973	1974 [1]	Change 1973 to 1974
	1961-65 average = 100					*Percent*
Western Europe	171	198	243	343	379	+10
North America	178	195	230	375	332	—11
Oceania	294	406	527	617	580	—6
Other developed market economies [2]	125	135	176	212	244	+15
Latin America	228	249	225	201	255	+27
Far East [3]	284	349	479	770	828	+8
Near East [4]	156	169	211	268	296	+10
Africa [5]	154	173	204	373	388	+4
Other developing market economies [6]	217	329	499	615	597	—3
Eastern Europe and the U.S.S.R.	197	202	221	284	360	+27

[1] Preliminary. – [2] Israel, Japan, South Africa. – [3] Excluding Japan. – [4] Excluding Israel. – [5] Excluding South Africa. – [6] Includes developing countries in North America and Oceania.

ference on the Law of the Sea, held in Geneva in May 1975. Although the idea of allowing some form of extended jurisdiction was widely accepted, a general agreement was not reached. The Conference is due to reconvene in New York in March 1976.

In the absence of agreement, the number of countries taking unilateral action continues to grow. Guinea-Bissau declared 150-mile territorial waters effective as of 31 December 1974, and Iceland extended its 50-mile exclusive fishing zone to 200 miles on 15 October 1975. At present, nearly 40 countries claim areas ranging from 15 to 200 miles offshore.

Changing trends in the pattern of national jurisdiction continue to influence existing arrangements for the international management and conservation of fishery resources. In some instances, the work of the fisheries commissions in determining the acceptable level of catch and its international allocation has been facilitated by the growing possibility that failure to reach agreement would encourage the coastal states to extend jurisdiction unilaterally. In other instances, the possibility of being excluded from important sources of supply has continued to encourage countries with far-ranging fishing fleets to negotiate joint ventures with the coastal states concerned.

Several bilateral agreements between participants in common fisheries were negotiated in 1974, and in 1975 China and Japan signed a treaty restricting fishing in some important areas The treaty will be valid for three years, regardless of the outcome of the Conference on the Law of the Sea. Another agreement, reached between Norway and the Federal Republic of Germany, the German Democratic Republic, France, Poland, the United Kingdom and the U.S.S.R., established three trawl-free zones in the Norwegian Sea. However, the dispute between Iceland and the United Kingdom over British trawling rights in the area which Iceland claims as its fishing zone has not been resolved.

Meanwhile, the multilateral regional commissions have made further progress in regulating the catch of important commercial species. Recent meetings of the North-East Atlantic Fisheries Commission have brought cod, haddock, whiting, plaice, sole and herring under quota regulation, and have placed restrictions on certain fisheries which concentrate exclusively on species used to make fish meal. In the northwest Atlantic, where the catches of most species were already subject to quota restrictions, the International Commission for the Northwest Atlantic Fisheries (ICNAF) placed further restrictions on the catch of a number of species, and also on the size of vessel and type of gear to be used in particular fisheries. In 1975, the Inter-American Tropical Tuna Commission (IATTC) again set catch limits for the eastern central Pacific, and the International Commission for the Conservation of Atlantic Tunas (ICCAT) followed the introduction of a 3.2 kg minimum size for yellowfin tuna by recommending a 6.4 kg minimum size for bluefin tuna, and that countries limit catches to recent levels. At its 27th Meeting in London in June 1975, the International Whaling Commission set new principles for management of whale stocks, which are to be classified as initial management stocks, sustained management stocks, and protected stocks. As a consequence, and on the basis of new assessments, the quota for several stocks was substantially reduced. Quotas were imposed for the first time in the north Atlantic.

Enforcement, long a major concern of fisheries commissions, has grown more difficult as the regulatory measures adopted become more complex (e.g. quotas, closed areas, closed seasons, mesh size, and

regulations concerning by-catches in controlled fisheries). With the extension of quotas to a greater number of stocks, it has become necessary to develop accurate and rapid reporting systems. Recent developments within the commissions, particularly ICNAF and IATTC, have drawn attention to these considerations. Of course, such problems are not peculiar to multilateral agreements; adherence to terms also safeguards equity and conservation interests in bilateral agreements.

The growing difficulties in increasing catches of conventional species from traditional grounds continue to encourage the development of alternative sources of supply, such as aquaculture and the exploitation of less familiar species and underexploited areas. Among the underexploited areas now attracting attention are the southern oceans, i.e. the area roughly south of 45°S. Although this region has been subjected to little or no exploitation of marine resources apart from whaling, its substantial shelf areas and other physical characteristics indicate that it might make a significant contribution to world fish supplies. Several countries, including Japan and the U.S.S.R., are now carrying out experimental operations in the region, although much of their activity centres on krill rather than fish.

The possibilities of exploiting krill have been under consideration for some time, and although both Japan and the U.S.S.R. have begun test marketing, the major technical problems involved in producing a product acceptable to a mass market have not been solved. Much of the existing fish technology appears to be inapplicable to krill, partly on account of the crustacean's small size and its poor keeping qualities when subjected to normal processing techniques.

In other areas of the world, the harvesting of unfamiliar species is also just beginning. Among these are the blue whiting (*Micromesistius poutassou*) in the northeast Atlantic and a similar species on the Patagonian shelf, both of which have a potential of several hundred thousand tons, and which could be marketed in frozen blocks or in a variety of product forms for which ordinary whiting and Alaska pollak are now used. Red crab (*Pleuroncodes planipes*) in the eastern central Pacific is another underexploited species with a large potential which could add substantially to world food supplies, and which may soon be supporting large-scale commercial fisheries. Other such species include cephalopods, which in areas such as the northeast Pacific are familiar and heavily exploited, but in other regions are unfamiliar and have considerable potential for further exploitation.

There continues to be a growing interest in aquaculture as an alternative source of fish, and production is increasing, in many cases with the encouragement of favourable government policies. The Government of India, for example, has recently established a number of fish farmer development agencies to promote new techniques. These agencies have recently obtained annual yields of up to 8 000 kilograms of carp per hectare from polyculture in stagnant waters. There have been substantial increases in aquaculture production in Japan, where total annual production of cultured fish and shellfish now stands at about 200 000 tons, and cultured seaweed at 500 000 tons. In the Philippines there has been an increase in the area under aquaculture. The main problems in the development of aquaculture include, according to the area, shortage of fish seed, the need for low-cost inputs, and a shortage of trained personnel. A global FAO/UNDP Aquaculture Development and Coordination Programme was launched in 1975 to find ways to overcome these restraints. Now in its preparatory phase, the Programme is organizing three regional workshops which will determine regional priorities for action and draw up long-term national plans for aquaculture development.

Outlook

The immediate outlook for world fishing is dependent to a significant extent on international economic trends. While a general stimulation of demand (e.g., as a result of recent efforts to combat unemployment in the major industrialized countries) should help to revive the demand for fish, future movements in the supply and price of competing forms of animal protein are of equal importance. In this respect, the situation gives cause for some optimism, since the production of most types of meat and poultry is expected to be lower in 1976. At the same time, the large inventories of ground fish, which depressed the market for much of 1974 and early 1975, have been reduced to more normal levels, and any significant increase in demand could soon be translated into improved ex-vessel prices.

The immediate outlook for other important fishery products is mixed. The further decline expected in pigmeat and poultry meat production in the developed countries will continue to have an adverse effect on the market for compound feeds generally, although the relative price of compound feed ingredients is likely to continue to encourage the use of fishmeal. Anchoveta landings from the southeast Pacific are expected to be higher than in 1974, and taken together with present estimates of the soybean crop, do not suggest any sharp divergence of current favourable price ratios in the immediate future. The

world market for shrimp has now recovered from the depressed condition of early 1974, but the market for canned tuna is currently depressed by large inventories. However, recent fishing results suggest that supplies of raw tuna (particularly albacore) are not so abundant, and ex-vessel prices in Japan are now beginning to move up again, although the market remains depressed in the United States, the other major producer.

Over the medium term the world catch of food fish is expected to increase by about 2 to 3% per year, or approximately the lower limit of recent annual increases. Much of this increase is expected to come from the developing countries, which border seas containing the greater part of the world's unexploited potential of conventional fish stocks. Some increase in catches can also be expected from the developed countries, either from the exploitation of the unconventional or less familiar species previously mentioned, or perhaps as a result of better management of stocks (e.g. herring in the north Atlantic). A number of developed countries would also stand to benefit from an international regime of extended national jurisdiction, but this would in large measure be at the expense of other developed countries and would not affect the growth of fish production in the developed countries as a whole.

In the developing countries, a major problem to be tackled over the medium term is the improvement of marketing and distribution systems. In many developing countries per caput consumption of fish demonstrates an extremely uneven pattern, being high near landing points but generally low elsewhere, with the exception of the larger cities. Frequently, a major constraint to growth of the fishing industry is not so much an inability to catch more fish, but difficulty in disposing of increased landings at remunerative prices. To overcome these problems, greater attention must be given to improving distribution networks so that fish can be made more widely available, and to developing products which will permit the sale of unfamiliar species in familiar product forms.

The economic and social problems of traditional fishing communities are now receiving increased attention. In many countries these communities contribute a substantial proportion of total fish supplies, but are characterized by the low productivity of their populations, which often comprise some of the least privileged socio-economic groups. While no concrete measures have been taken to improve the status of these communities, action has been taken to increase fishermen's productivity and raise their economic returns by improving market outlets, by introducing improved gear or, where resources permit, by increasing their radius of operations. These problems are complex and at times extend beyond the fisheries sector, requiring an integrated approach similar to that adopted in modern programming of agricultural development.

It must be emphasized that the pending changes in national jurisdictions will not reduce the need for rational management of fish stocks. Such action, already urgently needed in some cases, will be required for a growing number of stocks as the intensity of exploitation increases. Regardless of the effect that a 200-mile economic zone or some other extended jurisdiction may have on present conservation arrangements, the need to limit catches to the rate of renewal of stocks will remain. It is likely that the multilateral negotiation of quotas will continue in some areas and for some stocks, but in other cases there is a marked trend toward bilateral agreements. In the medium term, the international fishery bodies will become increasingly important as fora for the scientific discussion of the stocks situation, and there will be a growing need for assistance to developing countries in the fields of stock assessment and general management policy. As the need for intelligent management policies grows, the information on which management decisions are based (e.g. catch statistics and biological data) will have to be improved.

Forestry

Production and trade

World forestry production fell slightly in 1974 as demand from the construction sector and wood product manufacturers slackened under the impact of the economic recession. Market conditions were initially favourable, but began a sharply accelerating downturn at the middle of the year. Consumption was considerably lower for all forest products except pulp and paper, for which demand also slackened at the end of the year.

Total removals of industrial roundwood decreased slightly in 1974 (Tables 1-14 and 1-15). The only exception to the general downward trend was pulpwood, the last commodity group to be affected by the downturn in demand. There was a fall in production of logs, of sawnwood and of all wood-based panels except particle board. Trade declined in volume for all products except pulp and paper, but further increased in value following the substantial price rise of 1973. Prices for most products rose during the first half of 1974, but later tended to decline or stabilize.

The forest products market was particularly hard-hit by the economic recession because of the cutback in building construction. The drop in the number of dwellings started and completed was particularly marked in the Federal Republic of Germany, Japan, the United Kingdom and the United States. Manufacturers of products such as furniture and joinery were similarly affected by the restriction of demand. When some developed countries introduced easier credit terms, it was hoped that there would be an upturn in construction activities and a corresponding increase in consumption of forest products in 1975. However, information available for the first half of the year showed that the situation in many of these countries' construction sectors was still deteriorating.

Roundwood

World production of industrial roundwood fell by more than 2% in 1974 as compared with the record levels of the previous year, the first decrease after many years of steady growth. However, the different products were not equally affected. The decrease of nearly 5% in removals of logs was partly counterbalanced by a 4% rise in pulpwood removals in all regions. Many exporting countries in Africa and Asia had to cut back on production of tropical hardwood logs as a result of restriction of demand; there were particularly large reductions in Malaysia and the Philippines. In North America production of coniferous logs was cut back by 10%. Volumes of trade were inferior to those of 1973 for most products, but the total value of trade rose by about 30% owing to price increases.

Table 1-14. — Indices of world roundwood production, by main commodity groups, 1970 to 1974

	1970	1971	1972	1973	1974[1]	Change 1973 to 1974
	1961-1965 average = 100 percent					*Per-cent*
Logs	114	117	119	124	119	—4
Pulpwood	141	139	136	138	143	+4
Pitprops	85	81	80	80	80	...
Other industrial wood	123	124	124	125	125	...
All industrial wood	119	121	122	125	122	—2
Fuelwood	106	108	109	109	111	+2
Total roundwood	115	117	118	120	119	—1

Note: Indices of world roundwood production have been revised on the basis of improved statistical information for years under review and for the base period.

[1] Preliminary.

World trade in broadleaved logs fell by about 10% in 1974 as compared with 1973, but was still well above the 1972 level. The slowdown of demand from European and Asian importers resulted in the closure of a number of logging operations in exporting countries in Africa and Southeast Asia. The reduction of imports of tropical hardwood logs into European countries mainly affected Ghana and Ivory Coast. Southeast Asian exporters, especially Indonesia, Malaysia and the Philippines, were even harder hit by the reduction of Japan's imports, which account for more than half of the world broadleaved log trade. Other countries in the region also reduced their imports. Export unit values rose in 1974 as compared with 1973, but this tendency slackened toward the end of the year. Falling prices prompted some governments of the tropical exporting countries to undertake measures restraining production and exports.

World trade in coniferous logs declined by about 8% in 1974. Cutbacks in housing construction in Japan brought a reduction in that country's imports, which account for approximately two thirds of world trade in coniferous logs. Particularly affected were exporters in the United States and the U.S.S.R. The small increase in European trade was mainly due to sales of storm-damaged timber by the Federal Republic of Germany.

International trade in pulpwood reflected the favourable situation of the pulp and paper industries, which worsened only toward the end of 1974. In contrast to most other forest products, production of pulpwood expanded in both 1973 and 1974. However, trade in pulpwood represents less than 2% of the total value of world trade in forest products and is mainly between western developed countries and eastern Europe and the U.S.S.R. Imports by western European countries account for nearly 75% of world trade in pulpwood, and a tight supply situation, which in some countries continued through 1974, boosted European trade in pulpwood to a level considerably higher than the 1970 record level. Most of the additional exports were from Hungary, Poland, Romania and the U.S.S.R., which are estimated to have increased their exports by a total of 27% to attain a record of 12.5 million cubic metres, thus supplying almost two thirds of world trade. The Federal Republic of Germany also increased its exports substantially, while Sweden's exports declined markedly due to strong domestic demand. At the end of 1974 the tight supply situation reversed, and cutbacks were made first by the wood-based panel industries and then by the pulp mills, which had rapidly rising stocks and were faced with a falling demand for pulp. Pulpwood prices rose steadily in 1974 to attain a

level closer to that of sawlogs, offering more attractive prospects to forest producers.

World fuelwood production in 1974 is estimated to have been 1 170 million cubic metres, or nearly 50% of world roundwood production. Fuelwood removals in developing countries are believed to account for nearly 75% of output. While production has declined rapidly in the developed countries, it appears to be increasing in developing countries as a result of rising costs of alternative fuels. In some developing countries the difficulty of obtaining alternative fuels for domestic use has created an interest in growing and using more wood for fuel.

Sawnwood

World production of sawn softwood fell by 5% in 1974, the first decrease after many years of steady growth. The fall of about 15 million cubic metres from 1973 left production at the 1971 level of nearly 324 million cubic metres. The slowdown began in North America, where production and trade started to fall at the end of 1973 due to the situation in the housing sector. In 1974 production of sawn softwood in the United States and Canada was about 11% (nearly 12 million cubic metres) below the record 1973 level. In Europe the upward trend in production reversed only toward the end of 1974; production fell noticeably in Austria, the Federal Republic of Germany, Finland, Romania and Sweden. Production in Japan decreased by approximately 7% as compared with the 1973 level.

While the value of world trade in sawn softwood increased by 6% in 1974 as compared with 1973, volume of trade fell by 13% (8 million cubic metres). The fall in volume was most noticeable in the developed western countries and Japan, which account for more than 80% of world trade. Canadian shipments to the United States and Japan declined by 4 million cubic metres and the volume of western European exports suffered a similar decrease. Almost all the decline in European imports occurred during the second half of 1974 as consuming sectors were caught up in the economic recession. The reduction of European trade was also determined by the size of the region's stockpiles, which are estimated to have increased by 5 million cubic metres in 1974 as a result of strong advance purchases contracted in 1973.

The extent of the fall in consumption of sawn softwood cannot be calculated until full information on stocks becomes available. Consumption dropped substantially in 1974 in the importing countries of western Europe, the United States and Japan, but may have risen slightly in eastern Europe, where construction activities remained strong. Prices showed strong resistance, especially in Europe, but in many countries prices tended to decline toward the end of the year.

World production of sawn hardwood fell by 3% in 1974, the first decrease since the 1950s. The reversal of the previous upward trend was apparent in all regions, but was especially marked in the developing countries of Africa and Southeast Asia. In peninsular Malaysia production dropped by 31%. Although the production of the developing countries accounts for only 25% of the world total, the decrease in their production accounted for about 75% of the decline in world production in 1974.

World trade in sawn hardwood declined sharply in 1974 from the 1973 peak level to approximately the 1972 level in practically all regions. The slackening of demand in most of the importing countries in Europe and North America strongly affected the Southeast Asian exporters which had contributed most of the increase in exports to developed countries in 1972 and 1973. There was a marked fall in imports into Spain and the EEC countries. The decline in imports into the United States mainly af-

Table 1-15. — Indices of world roundwood production, by region, 1970 to 1974

Region	1970	1971	1972	1973	1974[1]	Change 1973 to 1974
	1961-1965 average = 100 percent					*Percent*
Developed market economies	112	114	114	116	113	—3
Western Europe	113	114	100	106	108	+2
North America	114	118	125	125	119	—5
Oceania	116	117	116	126	129	+2
Other developed market economies[2]	93	90	88	88	88	...
Developing market economies	126	131	134	140	136	—3
Latin America	119	124	123	124	125	+1
Far East[3]	134	140	146	161	153	—5
Near East[4]	125	126	128	121	121	...
Africa[5]	122	126	129	131	129	—2
Eastern Europe and U.S.S.R.	107	107	106	108	108	...
Asian centrally planned economies	118	121	124	128	128	...
World	115	117	118	120	119	—1

Note: Indices of world roundwood production have been revised on the basis of improved statistical information for years under review and for the base period.

[1] Preliminary. — [2] Israel, Japan, South Africa. — [3] Excluding Japan and Asian centrally planned countries. — [4] Excluding Israel. — [5] Excluding South Africa.

fected Latin American exporters. Only Japan maintained its sawn hardwood imports at their 1973 level. While information on changes in stocks is inadequate, consumption of sawn hardwood fell in both Europe and North America in 1974, and probably in all other regions.

Volume of trade in sawn hardwood fell by 19% and value increased by 9% in 1974 as compared with 1973. However, there were marked price variations for several tropical species and some temperate species. There have been considerable price reductions for some tropical hardwoods in Europe and Japan since the end of 1973. At the beginning of 1975, prices for some species and assortments began to recover in the Federal Republic of Germany, Italy and Japan as importers' stocks were run down, but there was no indication that this had become a trend.

Wood-based panel products

In 1974 the world market for wood-based panels reflected the reduction of activity and demand in the consuming sectors of the developed western countries and Japan where most production and consumption are concentrated. However, the three wood-based panel markets were not uniformly affected. Particle board showed some resistance, maintaining a 2% production increase, which, however, compares unfavourably with the previous high rates of expansion. Production of fibreboard was down by 3% and that of plywood by 9%.

In North America market conditions continued to deteriorate throughout 1974. Production and imports of all types of wood-based panels declined substantially from the high levels of 1973, reflecting the difficult situation in the construction sector and the wood product industries. North American output of plywood (mainly softwood) is estimated to have been 11% (more than 2 million cubic metres) below the 1973 level, that of particle board 14% (about 1 million cubic metres) less, and that of fibreboard 5% (500 000 cubic metres) less. The 8% drop in plywood production in Japan and the 7% fall in Europe in 1974 also appeared to be the result of the contraction of building construction and associated activities such as furniture-making. Production fell by 57% in Italy and 22% in Finland.

Almost 60% of the plywood and veneer produced in the developing countries is exported to the developed western countries and Japan, and the contraction of demand had a strong impact on some of the main exporting countries of Southeast Asia, which had covered most of the developed countries' increase in demand in previous years. Total imports of plywood into Japan, the United Kingdom and the United States — which are among the biggest importers — fell by 40% in 1974, and the Republic of Korea, Malaysia, the Philippines and Singapore reduced their exports in a similar proportion. The only exception to the downward trend was the increase in exports of softwood plywood from the United States to Canada, where market conditions were still favourable. Apparent consumption of plywood fell in all regions except eastern Europe and the U.S.S.R., but the decline in real consumption may have been even greater in 1974, as stocks are believed to have been higher at the end of the year.

After several years of expansion at an annual average growth rate of 15% (2 million cubic metres), the growth of the European particle board market came to a halt in 1974. Production continued to rise slightly in most countries, but the region's total output was affected by a substantial fall in Italian production. The downward trend became marked toward the end of the year in several important producing countries, notably the Federal Republic of Germany, France and Sweden. European particle board trade, which is mainly intraregional, began a decline which accelerated at the end of the year and the beginning of 1975. Imports into Denmark and the United Kingdom and exports from Finland fell sharply. In 1974 apparent consumption of particle board in Europe stood at the same level as in 1973, but available information on changes in stocks in 1974 indicates that real consumption may have fallen slightly.

Developed western countries and Japan account for 75% of world fibreboard production, and the 6% decline in their 1974 production was only partly offset by an estimated 9% increase in the production of the eastern European countries, notably Poland. By the end of 1974 there was a marked decline in fibreboard trade. The 30% decrease in imports into the United States may partly explain why the western European countries' exports dropped more strongly than did their imports. The U.S.S.R. increased its exports to eastern European countries, notably to the German Democratic Republic, Hungary and Poland.

While the volume of world trade in wood-based panels declined in 1974, the value of trade increased by 10% over the 42% rise in 1973. Increases in trade values were particularly marked for particle board and fibreboard. Developed western countries and Japan account for 60% of world trade in wood-based panels, developing countries for 26%, and eastern European countries and the U.S.S.R. for 14%. These proportions have remained stable in recent years.

Pulp and paper

World production of wood pulp increased by 2% in 1974, reaching a record level of 120 million tons

owing to the vigorous demand of the paper and paperboard industries during the first part of the year. Production increased by 2% in the developed western countries and Japan, which together account for 86% of world production, and by 6% in eastern Europe and the U.S.S.R. and in the developing countries. Production fell slightly in Japan, where demand for paper and paperboard began to decline early in the year. However, demand in North America and Europe remained strong until the end of the year. Trade in wood pulp increased by 2% in tonnage and 74% in value in 1974, accounting for 20% of total world trade value in forest products. Exports from the Scandinavian countries declined owing to strong domestic demand, while there were substantial increases in exports from North America, mainly Canada, to Japan and western European countries.

World production of paper and paperboard increased by 2% in 1974. The slight increase in newsprint production was mainly due to a marked rise in Canadian production. World production of paper and paperboard other than newsprint increased by 2%, with production in North America almost stable for all types, and an increase in western European production due mainly to demand for printing and writing paper. In Japan there was a slight increase in production of newsprint.

World trade in all types of paper and paperboard increased by 10% in tonnage and 46% in value in 1974, representing 55% of the total value of world trade in forest products. Increased Canadian exports of newsprint, most of which went to the United States, accounted for 68% of the world trade volume for this product. World trade in paper and paperboard other than newsprint increased by 15% in 1974, with increased exports from North America and the Scandinavian countries going mainly to western European countries. Trade in paper and paperboard was again mainly concentrated in the developed western countries and Japan. Exports to developing countries were critically limited toward the end of 1973 and in early 1974, but constraints have since been eased. However, high prices have limited purchases in some developing countries.

The price of pulp rose considerably in 1974, showing a 71% increase in average export unit value over 1973. Prices for paper and paperboard also increased, though at a more moderate rate, with a notable rise in the prices of Scandinavian products exported to western Europe. In contrast to the prices of other forest products, which tended to decline toward the end of 1974, those of pulp, paper and paperboard showed good resistance, and in some cases moderate increases. The substantially higher prices of these products improved the situation of the pulp and paper industries, which were faced with rising production costs. However, the decline in consumption and rise in stock levels at the end of 1974 made any further increase in production capacity appear uncertain, for these industries are still affected by the difficult financial conditions under which they were operating in 1971 and 1972. Decisions to expand production capacity, which must be taken well in advance, may be influenced by the present unsettled economic situation. Consequently, if demand does not remain at a low level, delays in installing new units may affect supply at the end of the decade, when shortages of paper and paperboard of all grades are foreseen.

Policies and other issues

Developed countries

Environmental issues continue to affect forest management in most European countries. The need to adapt forest policies to changing conditions and requirements has led to the revision or review of forest laws in Belgium, Denmark, France, the Federal Republic of Germany, Ireland, Italy, Norway, Sweden, Switzerland and the United Kingdom. The process of adaptation seems to have been somewhat easier in the U.S.S.R. and eastern European countries, mainly because of administrative structures and patterns of forest ownership. In adapting their forest policies to meet environmental requirements, many of these countries have given special consideration to wildlife development and conservation. The relations between forest management and the environment were discussed at the Economic Commission for Europe/FAO Symposium on Forests and Wood: Their Role in the Environment, held in September 1975 at Interlaken, Switzerland.

Many European governments are realizing the need to improve forest productivity and establish long-term forest balances, and some have taken steps to promote future wood raw material production potential as part of the multiple-use function of their forests. The EEC Commission is discussing similar measures for possible application by all member countries. The U.S.S.R. and the eastern European countries have shown special interest in the economic utilization of lesser quality roundwood and harvesting residues, particularly of broadleaved species.

In the United States, the Forest and Rangeland Renewable Resources Planning Act of August 1974 specifies that the country's forests should be used to provide both raw materials and amenities in a way that maintains environmental quality, and stipulates that a Renewable Resources Assessment be prepared

every ten years. A first assessment was prepared in 1975, a second will be made in 1979, and future assessments will be made at ten-year intervals thereafter. A draft summary of the first assessment and the summary of the Environmental Program for the Future prepared in 1974 were made available for public comment in 1975.

Japan's Fundamental Plan Concerning Forest Resources, covering the period up to 2021, also envisages the use of forest resources for production of timber and conservation of soil and water. In order to secure stable supplies of timber, the country plans to intensify economic cooperation for the development of forest resources in producing countries, in particular the developing countries of Southeast Asia and South America.

Developing countries

The severe setback to exports of tropical forest products caused by the economic recession in importing countries prompted developing exporting countries to intensify their efforts to improve returns in 1975. Efforts were made to both coordinate trade policy and upgrade trade from roundwood raw materials to processed products. In Africa, 11 exporting countries founded the African Timber Organization (OAB) at Bangui in May 1975. The new organization is designed to enable timber producers to better control the market and maintain price stability, and to facilitate joint action to obtain acceptable freight rates. In Southeast Asia, Indonesia, Malaysia and the Philippines have discussed ways of adjusting wood exports to lower demand, and a more wide-ranging proposal for continuing cooperation is under consideration. A number of countries in the region have either prohibited the export of roundwood to favour domestic processing or, following the example of the Philippines, are progressively phasing out such exports. Indonesia, Malaysia and other wood-producing countries are studying the feasibility of establishing new industrial complexes to process wood for export.

Increasing attention is being given to expanding pulp and paper manufacturing capacity in developing countries. Although the supply situation has improved, prices remain high, and FAO has forecast an even severer shortage by the end of 1976. Unesco, FAO and UNCTAD have begun a study to determine the feasibility of setting up a system of stocks to offset the effects on developing countries of further short-term shortages of cultural papers. With the assistance of UNDP and the World Bank, FAO is also engaged in a programme to study and expedite long-term development of new producing capacity in the developing countries. Brazil has substantially expanded its pulp and paper industry, and has prepared a National Pulp and Paper Development Programme which should enable it to export pulp in 1980.

Vigorous afforestation programmes are being implemented in a number of countries for both production and conservation purposes. India's Five Year Plan, launched in 1974, marks a change to a dynamic, production-oriented forestry programme under which 1 290 000 hectares are to be planted and wood-based manufacturing facilities located near the new plantations. Both Indonesia and Malaysia are planning considerable reforestation work; Indonesia has set a target of 4 million hectares. In China a massive tree planting programme has been initiated to control soil erosion and provide timber resources. Peasants in Shantung Province planted 618 million trees near villages and along roads and streams in 1974, and 48 600 hectares have been planted for timber production. In Latin America, Brazil plans to reforest 4.2 million hectares for the production of pulp, and Chile plans to reforest at a rate of 80 000 to 100 000 hectares annually. In Africa, Kenya has embarked on the second stage of an afforestation programme to provide pulpwood to a mill that is now in production in the country, and planting in Nigeria is being stepped up to provide pulpwood for two forthcoming mills. Work on shelterbelt research is under way in the Sahelian zone countries. In the Near East, where inadequate forest cover constitutes a major problem, considerable progress in afforestation has been made in a number of countries. Egypt now has a total of 14 000 km of trees planted along canals and plans to plant an additional 8 000 km. Iraq plans to plant 9 000 hectares over the next five years.

Parallel with this continued emphasis on afforestation, renewed attention has been given to protecting the natural tropical forests. The deliberations of the World Food Conference again highlighted both the importance of forests as the largest remaining reserve of potentially cultivable land, and the ecological and environmental constraints that must be observed in developing this potential. This has reinforced the long-standing concern about the depletion of tropical forest resources. As one response to this concern, FAO and UNEP will begin a pilot tropical forest monitoring project in 1976 to provide information on the location, extent and nature of changes in the tropical forest. In Asia, the development of tropical forest areas was discussed at the Meeting on Ecological Guidelines for Southeast Asia held at Bandung, Indonesia from 29 May to 1 June, 1974.

The food situation has also focused attention on systems of agri-silviculture (i.e. methods of combining food production with forestry). Modifications of the traditional "taungya" system have produced agri-sil-

viculture systems which are more efficient and contribute more effectively to the creation of viable rural communities.

There has been growing recognition of the interrelationship between forests, wildlife and other natural resources. In Latin America, Peru has promulgated a law making all forest and wildlife resources state property. In Colombia an all-embracing law, based on the principle that the environment is the common heritage of all, regulates the management of all natural resources from the atmosphere to the soil. Numerous steps have also been taken to improve wildlife and national park management in the region. Several universities have established professorships for this purpose, and training courses are being organized in Central American countries. Argentina, Bolivia, Chile and Peru are implementing a convention for the protection of vicuña, and Bolivia has a new law on national parks and wildlife. In Africa, several countries are in the process of introducing new wildlife and national parks legislation in order to implement the provisions of the African Convention on the Conservation of Nature and Natural Resources held at Algiers in 1968. Cameroon has established a new Directorate for National Parks, while Kenya is taking steps to establish a unified Wildlife and National Parks Service by amalgamating the existing Game Department and National Parks Administration. Tanzania has established the Tanzanian Wildlife Corporation, which manages all commercial aspects of wildlife management. The Seminar on Wildlife Management in Woodland Savana, held in Ibadan, Nigeria from 22 to 26 September 1975 under the auspices of the University of Ibadan and the Ecole de Faune (Garoua, Cameroon) brought together many wildlife managers from both East and West Africa.

All regions have shown increasing interest in forestry development planning. In the Near East, Egypt, Iraq, Jordan, Kuwait, Lebanon, Somalia and Sudan have either specific forestry development plans or national development plans which incorporate forestry activities. In Latin America, the National Forestry Development Programme of Mexico seeks to utilize forest resources in a way that will satisfy social, economic and environmental interests, raise the standard of living of rural populations, and ensure permanent utilization of forests. Further efforts have been made in the region to strengthen over-all administrative capacity for forestry development. Argentina has created a Secretaría de Estado de Recursos Naturales y Ambiente Humano, Guatemala has a new Instituto Nacional Forestal which groups together all government units previously concerned with forestry, and Bolivia has set up a Centro de Desarrollo Forestal. Research institutions are also being strengthened in several regions. Colombia has established a Corporación Nacional de Investigación y Fomento Forestal. Bangladesh, Burma Iraq and Pakistan are also actively expanding forestry research and demonstration facilities.

Progress continues to be made in forestry education and training. In Latin America, Cuba has trained 1 000 students at various levels, and Honduras has recently strengthened the Forestry School of Siguatepeque. Several educational institutes have been established or planned with FAO/UNDP assistance in Bangladesh, Burma, Malaysia and other Asian countries. A vocational training school for forest guards and wildlife guards has been opened in Somalia. A Wildlife Management Training Institute is being built in Kenya with assistance from the World Bank to cater for the country's primary level and specialized training needs. Botswana and Nigeria are also establishing wildlife training schools at primary level.

United Nations conferences and Special Session

Follow-up to the World Food Conference

The World Food Conference, held in Rome in November 1974, called for five main international initiatives: [16]

1. A World Food Council to be established at the ministerial or plenipotentiary level and to function as an over-all coordinating body on food policies and other related matters of concern to all the agencies of the United Nations system.

2. An International Fund for Agricultural Development to channel additional investment funds for increasing food and agricultural production in the developing world.

3. A Consultative Group on Food Production and Investment in Developing Countries.

4. An International Undertaking on World Food Security, with the establishment within FAO of a Committee on World Food Security and a Global Information and Early Warning System.

5. An improved policy for food aid.

[16] See *The State of Food and Agriculture 1974*, p. 44-46.

Various international actions have been taken to follow up the recommendations passed by the Conference.

World Food Council

The World Food Council was established by the General Assembly of the United Nations on 17 December 1974 as an organ of the United Nations. The Council is composed of 36 member states including the U.S.S.R. (which is not a member of FAO) and has been formed taking into account the need for a balanced geographic representation.

In its first session, held in Rome from 23 to 27 June 1975, the Council reaffirmed its role of a coordinating political body dealing with world food problems and agreed that its main functions would be:

(*a*) to monitor all aspects of the world food situation, including what international agencies are doing to develop short- and long-term solutions to food problems;

(*b*) to determine the validity of the world food strategy as a whole;

(*c*) to identify malfunctions, gaps and problem areas; and

(*d*) to exert its influence, through moral persuasion, to obtain any necessary improvements.

The Council identified a higher and sustained rate of increase of food production in developing countries as its first priority and the establishment of the International Fund for Agricultural Development and the creation of a system of world food security as other crucial areas. A selective approach was adopted to avoid duplication of effort. The Secretariat of the Council is to primarily scrutinize and evaluate the world food situation and suggest measures for improving it, while relying on the expertise of the specialized international agencies for major research efforts.

Among these agencies, FAO has a special position, not only because, as the World Food Conference recommended, the World Food Council should be serviced within the framework of FAO, but also because of the areas of common interest shared by these two international bodies. In this respect, the FAO Council agreed that it was important to avoid duplication of activities and, noting that the World Food Council was to serve as a coordinating mechanism on food matters for all agencies of the United Nations, recommended that a system of regular exchange of information be established between FAO and the World Food Council and recognized at the same time that policy issues which required a coordinated approach by United Nations agencies should be referred by FAO to the World Food Council.

International Fund for Agricultural Development

One of the most important elements of the World Food Conference's strategy to increase the rate of increase of food production in the developing countries was the provision of much larger amounts of capital for agriculture in this group of countries. The Conference had fully supported estimates prepared by its Secretariat which indicated that new capital funds from the developed countries should be increased to about U.S.$5 000 million a year by 1980, or about double the 1974 level.

It was for this purpose that the Conference called for the immediate establishment of an International Fund for Agricultural Development (IFAD). In December 1974 the General Assembly endorsed the Conference's resolution requesting establishment of the Fund.

Important progress has since been made toward the creation of the Fund. A meeting of interested countries convened by the United Nations Secretary-General at Geneva on 5 and 6 May 1975 overwhelmingly supported the Fund's establishment and set up an *Ad Hoc* Working Group to examine operational, procedural and other related questions.

After two sessions of the Working Group, in June and September, representatives of 69 countries met again from 27 to 31 October in Rome and recommended to the Secretary-General:

(*a*) that the Fund be established as a specialized agency within the United Nations system with autonomy for policy formulation and operations;

(*b*) that the General Assembly authorize the Secretary-General to convene a plenipotentiary conference in February 1976 in Rome to complete arrangements for the creation of the Fund; to adopt and open for signature an agreement establishing the Fund as a specialized agency; to receive pledges to the Fund; and to establish a Preparatory Commission which will make all arrangements necessary to enable the Fund to commence its operations at the earliest possible date.

The meeting approved Draft Articles of Agreement for formal adoption by the plenipotentiary conference. Developed countries and developing contributing countries at the meeting confirmed their intention to meet the initial target of 1 000 million special drawing

rights (SDR) [17] as originally proposed by Saudi Arabia, Iran and other OPEC countries.

Some countries indicated the level of the contributions they intend to pledge to the Fund (United Kingdom, £15 million; Norway, SDR 10 million; the Netherlands, SDR 32 million). The United States restated its intention — as expressed in September at the Seventh Special Session of the General Assembly — to seek congressional approval for a contribution of $200 million to IFAD, provided other countries would contribute in such a way that the target would be met. The EEC is considering the possibility of contributing to the Fund pending final agreement between the nine Member Countries.

Other developed countries and some OPEC countries, in particular Iran, Kuwait, Libya, Saudi Arabia and Venezuela, stated their intention to contribute to the Fund.

The expected establishment of an International Fund for Agricultural Development is generally regarded as one of the most important results of the World Food Conference. The Fund, in which developed countries, contributing developing countries and potential recipient countries will be represented, is to provide grants and loans on highly concessional terms for agricultural development with first priority given to the poorest food deficit countries, and to encourage increased food production in developing countries.

Consultative Group on Food Production and Investment in Developing Countries

The World Food Conference requested the World Bank, FAO and the United Nations Development Programme to organize a Consultative Group on Food Production and Investment in Developing Countries in order to:

(*a*) encourage a larger flow of external resources for food production;

(*b*) improve the coordination of activities of different multilateral and bilateral donors; and

(*c*) ensure a more effective use of the available resources.

The Group held its first meeting in Washington in July 1975. It is not an executive body, and is expected to achieve its objectives primarily through an exchange of experiences and ideas by its members. Membership includes donor countries (both traditional and "new" donors, such as OPEC members), international bodies with important programmes of assistance to the food systems of developing countries, and developing countries.

The Consultative Group will keep the World Food Council regularly informed of its work so that the Council may consider policy questions arising out of its discussions. Similary, the Council may request the Consultative Group to give attention to important matters which are within the Group's investment responsibilities. Communication channels will also have to be established between the Group and its three sponsoring agencies.

The Group is still in the formative stage. Its first meeting was devoted largely to procedural questions, although special attention was given to the investment needs for fertilizer production and distribution systems in developing countries. The second meeting of the Group was scheduled for February 1976.

International Undertaking on World Food Security

Measures to increase food production are not in themselves sufficient to ensure adequate supplies of basic foodstuffs for all people at all times. Natural and other disasters, weather, fluctuations in prices and inadequate stock policies are some of the factors which may at any time provoke serious food shortages, especially in developing countries.

The World Food Conference recognized the common responsibility of the entire international community to evolve policies and arrangements designed to ensure world food security, and in this light endorsed FAO's proposal of an International Undertaking on World Food Security and invited all governments to participate in it. It also recommended the establishment of a Committee on World Food Security as a standing committee of the FAO Council to keep under review the implementation of the Undertaking. The central feature of the Undertaking is an internationally-coordinated system of national food stock policies (primarily cereals) which, in combination, would guarantee at least a minimum safe level of basic food stocks for the world as a whole.

The practical implementation of the Undertaking will require cooperative action by governments on each of its four main elements:

(*a*) national stock policies in accordance with the agreed guidelines;

[17] SDR (special drawing rights) is a form of international reserve asset available to countries participating in the Special Drawing Account of the International Monetary Fund. Since 1 July 1974 the Fund has valued special drawing rights in terms of 16 currencies, using the technique known as the "standard basket" valuation. Special drawing rights are being used increasingly as a unit of account in commercial transactions. Currently, SDR 1 000 million are roughly equivalent to U.S.$1 170 million.

(*b*) periodic intergovernmental consultations on the adequacy of stocks and the action required to safeguard world food security;
(*c*) special assistance to developing countries to enable them to effectively implement their stock and production programmes;
(*d*) participation in an improved food information system.

In November 1974, the FAO Council adopted the Undertaking and transmitted it to all Member Nations of FAO and the United Nations. By mid-November 1975, 59 countries had subscribed to it, while another seven, some of which are major cereal exporters, had announced their intention to join. This response is encouraging, as the countries which have adopted the Undertaking account for about 95% of world cereal exports and more than 50% of world cereal imports. Nevertheless, a larger participation is essential if world food security is to be achieved. Attaining this objective as soon as possible remains of paramount importance, since cereal stocks are presently near minimum working requirements and would not constitute a sufficient reserve in the event of major crop failures.

The Seventh Special Session of the United Nations General Assembly in September 1975 asked that intensive work be continued to determine the size of the reserve, taking into account the proposal made at that Session by the United States that the components of wheat and rice in the total reserve be 30 million tons. It further recommended that developed countries and developing countries in a position to do so place at the disposal of the World Food Programme an emergency reserve of at least 500 000 tons pending the establishment of a world food grain reserve.

In May 1975, the FAO Council convened an *Ad Hoc* Consultation on World Food Security pending the creation of a standing Committee on World Food Security by the FAO Conference in November 1975. This Consultation reaffirmed the urgency for all governments to subscribe to the objectives and policies of the Undertaking and to make them effective through intergovernmental consultation, stressed the need to intensify assistance to developing countries in formulating and implementing food stock and production programmes, and invited all governments to participate in the Global Information and Early Warning System. It also reviewed the outcome of discussions held in other fora [18] on new world commodity arrangements affecting production, trade and aid in grains to improve world food security.

Meanwhile, FAO has initiated a Food Security Assistance Programme in cooperation with other international organizations to advise developing countries on appropriate national food stock and storage policies, to suggest measures which should be undertaken to implement an effective action programme, and to assist in mobilizing the technical, financial and food aid required. Thus far, FAO missions have advised nine countries in several regions, and interested donor countries have been invited to participate in the follow-up action required.

A vital part of world food security is an efficient global system providing timely information on the current and prospective crop and food situation and related areas affecting food supply and demand. The World Food Conference therefore requested FAO to establish a Global Information and Early Warning System on Food and Agriculture.

At its Sixty-Fifth session in May, the FAO Council agreed that the System be established in FAO to:

(*a*) monitor continuously the world food supply/demand conditions (including fertilizers and other key inputs) so as to assist governments in taking timely and appropriate measures;

(*b*) identify countries or regions where serious food shortages and worsening nutritional conditions are imminent, and assess possible emergency food requirements;

(*c*) contribute to the effective functioning of the International Undertaking on World Food Security.

The System will gather information supplied on a regular and voluntary basis by participating governments and international organizations, and publish reports at regular and timely intervals on the food situation and outlook, expected food shortages, food stocks and food aid, fertilizers and pesticides. Certain data supplied by governments may be treated as confidential if this is so requested.

Food situation and outlook reports have been issued at monthy intervals since April 1975. [19] These reports have a distribution limited to participating countries and cooperating international organizations.

The Director-General of FAO has transmitted the working arrangements for the Global Information and Early Warning System on Food and Agriculture to all member countries of FAO and the United Nations, as well as to interested international organizations, and has invited them to participate in the System.

[18] The FAO expert meeting held in February 1975, the conference of major grain producing, consuming and trading countries convened by the United States Government in February 1975; the Preparatory Group established by the International Wheat Council to examine the bases for a new international grains arrangement; and the Subgroup on Grains set up within the framework of the GATT multilateral trade negotiations.

[19] *Food Outlook Quarterly*; *Food Information*, monthly supplements to *Food Outlook Quarterly*; and monthly reports, *Foodcrops and Shortages*.

By November 1975, 48 countries, including all the major grain exporters, had agreed to participate in the System, while another 10 had indicated their intention to participate.

Food aid policy

The World Food Conference called for the formulation of an improved food aid policy which would assure a reasonable degree of continuity in food aid supplies from year to year. In order to reduce the fluctuations in the amount of food aid supplies, which tend to reach their lowest level in periods of shortage when food aid is most needed, the Conference recommended that all donors adopt the principle of forward planning of food aid and approved a commitment to provide commodities and financing for food aid to a minimum level of 10 million tons of cereals per year, starting in 1975. It also recommended guidelines for the reconstitution of the WFP Intergovernmental Committee as a Committee on Food Aid Policies and Programmes to be entrusted with promoting a more effective coordination of multilateral and bilateral food aid programmes.

In spite of the appeal made by the World Food Conference — and further reiterated at the World Food Council and at the Seventh Special Session of the United Nations General Assembly — only two donor countries have accepted the principle of forward planning of food aid on a three-year basis. By mid-October 1975, commitments for 1975/76 were estimated at 9 million tons, 1 million tons short of the 10 million-ton minimum target. Although this represents a considerable increase over the exceptionally low level of 5.4 million tons of food aid in cereals in 1973/74 and an improvement over 1974/75, it is still far below the 12.7 million ton level of 1970/71 when the MSA countries' balance of payments situation, and consequently their capability to purchase food on the commercial market, was much better than it will be in 1975/76.

The share of food aid channelled through the World Food Programme has significantly increased, reflecting the World Food Conference recommendation. Pledges amounting to the equivalent of almost $600 million have been announced for the period 1975-76, against $360 million for 1973-74. These pledges are separate from the emergency reserve fund, which the Seventh Special Session of the United Nations General Assembly has recommended be placed at the disposal of the World Food Programme.

The Economic and Social Council (Ecosoc) and the FAO Council endorsed the draft resolution of the WFP Intergovermental Committee for its reconstitution into a Committee on Food Aid Policies and Programmes along the lines recommended by the World Food Conference. By the end of 1975, the resolution had been approved by both the FAO Conference and the United Nations General Assembly.

Seventh Special Session of the United Nations General Assembly

The Seventh Special Session of the United Nations General Assembly, held from 1 to 16 September 1975, was devoted to development and international economic cooperation. Its two main objectives were:

(*a*) to consider new concepts and options with a view to promoting effectively the solution of world economic problems, and

(*b*) to initiate structural changes to make the United Nations system a more effective instrument for promoting world economic cooperation and implementing the International Development Strategy.

The Session started with a clear recognition of the issues before it, the points to be resolved and the options available. Considerable preparations had been made: there had been a number of conferences within the United Nations system, the multilateral trade negotiations under GATT, the preparations for the Fourth United Nations Conference on Trade and Development (UNCTAD IV), and the negotiations on resources transfer and international monetary reform in the IMF. In addition, informal negotiations had proceeded alongside the work of the Preparatory Committee and during the Fifty-Ninth Session of Ecosoc.

Of equal significance were the preparations which continued outside the United Nations: the Conference of Developing Countries on Raw Materials, held in Dakar in February; the negotiations leading to the Lomé Convention between the EEC and a number of developing countries in Africa, the Caribbean and the Pacific; the meeting of the OECD Council in May; the meeting of Commonwealth Heads of Government, held in Jamaica in May; and the meeting of the Foreign Ministers of Non-Aligned Nations, held in Lima in August.

The Seventh Special Session culminated in the unanimous adoption of Resolution 3362 (S-VII) setting a framework for future action to promote development and international economic cooperation with proposals covering all seven major issues dealt with by the Session: international trade, transfer of resources from rich to poor countries, science and technology, industrialization, food and agriculture, cooperation among the developing countries, and re-

structuring of the economic and social sectors of the United Nations system.

With reference to international trade, the Resolution formulated proposals to expand and diversify the trade of the developing countries and to improve the terms of trade of these nations with the developed world, including protection of their purchasing power and reductions in tariff barriers. A major question was whether the developing countries' position should be protected by an integrated commodity support scheme with measures financing buffer stocks, or through compensatory financing of shortfalls in export income. These issues as well as other important trade-related questions, such as multicommodity trade agreements and the feasibility of the indexation of raw material export prices from developing countries, have been referred back for further studies and will again be discussed at the Fourth Session of the United Nations Conference on Trade and Development in Nairobi in May 1976.

With regard to the problem of resource transfer, the developed countries confirmed their continuing intention to meet the official development assistance target by increasing their contributions to reach 0.7% of their GNP by 1980, as agreed in the International Development Strategy for the Second Development Decade. Those who had not yet made a commitment undertook to try to reach the goal before the end of the decade. The Resolution also calls on the developed countries to strengthen and expand the scope of existing international development agencies such as the World Bank, UNDP and the regional development banks. No solutions were reached on proposals regarding the linking of development assistance to special drawing rights and the rescheduling of poorer countries' debts.

The Resolution specifically provided for increasing both financial and technical aid to the poorer countries to help them to increase their agricultural production. It called on the developed countries to provide them with adequate quantities of both necessary agricultural inputs (notably fertilizers) and foodstuffs for import. The Resolution gave priority to further reduction of post-harvest food losses in developing countries with a view to halving them by 1985. Both developed and developing countries were urged to make contributions to the new International Fund for Agricultural Development. All Member States were urged to accept the twin principles of a minimum food aid target and the concept of forward planning of food aid, combined with a first target for the 1975/76 season of 10 million tons of food grains. They were also urged to participate in the Global Information and Early Warning System on Food and Agriculture.

The Consultative Group on Food Production and Investment in Developing Countries was invited to quickly identify the developing countries having a potential for the most rapid and efficient increase in food production, and the food deficit developing countries having a potential for rapid agricultural expansion. Such an assessment would assist developed countries and the competent international agencies in judiciously concentrating resources and aid for the promotion of food production in the developing world. Proposals for the transfer of scientific and technological expertise supplement those provisions.

The Seventh Special Session provided encouraging proof of a constructive dialogue on issues that previously had been a cause of contention in the United Nations as well as in other international fora. The Resolution thus represents not only an acknowledgement of the pressure for major changes that have built up within the international economic system during the last few years, but also demonstrates the usefulness of the framework provided by the United Nations system.

Conference on the Law of the Sea

The Third Session of the Third United Nations Conference on the Law of the Sea, which took place in Geneva from 17 March to 9 May 1975, ended without any further definite agreement on the major issue of exploitation rights over the sea and seabed. Instead, the chairmen of the three main committees collaborated in the preparation of a negotiating text based on formal and informal discussions held during the session, and it is hoped that this text will provide a basis for more fruitful negotiations at the Fourth Session of the Conference due to be held in New York in March 1976.

The main obstacle to any conclusive agreement was continued dispute over the scope and nature of territorial waters and "economic zones." While the general principle of 12 miles of territorial waters and 200 miles of offshore "economic zone" had already been accepted by many countries at the Second Session in Caracas last year, the Third Session highlighted the major differences of opinion over the demarcation of these areas and the rights each country would have within them. For instance, the 12-mile limit would turn more than one hundred important straits into territorial waters, and many countries expressed fears about freedom of passage through such straits. No agreement was reached on the demarcation of "economic zones," particularly around small islands and archipelagos and in restricted areas such as the North Sea, while some countries such as Canada, the United Kingdom and the United States ex-

pressed special interest in extending their rights to the continental shelf beyond the suggested 200-mile limit. While most countries agreed to the principle of exclusive rights to seabed resources within these zones, the sensitive question of exclusivity of fishing rights remained unresolved, especially among the countries of the north Atlantic. Lack of agreement has raised fears that these countries will act unilaterally. Iceland has already declared its intention to maintain a 200-mile fishing zone. Other areas of disagreement are related to shipping rights and pollution control within the "economic zones," with many countries fearing that extensive control of pollution might lead to interference with navigation.

Disagreement continued on the nature of the proposed authority which would administer and control the exploitation of the deep seabed's mineral resources, designated the "common heritage of mankind." The developing countries expressed fears that the exploitation of the considerable manganese, nickel, copper and cobalt resources which are known to exist would become monopolized by private companies from the developed countries and would push down world prices, and there was a strong feeling among many developing countries that the right to exploitation should be vested in the authority. The Conference closed with a plea by the President for restraint until the Conference of 1976. In the face of growing impatience in many countries, agreement on these major issues will be vital in 1976.

World Conference of International Women's Year

International Women's Year was proclaimed by the United Nations General Assembly in 1972 at the suggestion of the United Nations Commission on the Status of Women: 1975 was the midpoint of the Second United Nations Development Decade, and the Year was marked by intensified action by the United Nations and its member nations to promote equality between men and women, to ensure full integration of women in social and economic development, and to emphasize the role of women in pursuing world peace. These various activities culminated in an international conference held under the auspices of the United Nations.

The World Conference of International Women's Year was held in Mexico City from 19 June to 2 July 1975. The purpose of the Conference was to provide a focal point and to develop an action programme for the subsequent implementation of the International Women's Year goals of equality, development, and peace. The Conference was the first United Nations conference devoted specifically to the status and role of women, and the first major international forum ever held for women meeting to discuss common problems and aspirations.

Discussions at the Conference covered a wide range of topics relating to the status and role of women at all levels of society throughout the world, with considerable attention being given to the actual and potential role of women in the development process in its widest sense, and especially to women in the poorer countries.

Although women play an important role in many economies, especially in the rural economies of the poorer countries, the importance of their contribution is commonly overlooked in development plans and programmes, and they are often excluded from rural extension and training schemes, cooperatives, and other means by which they could improve their status and their economic efficiency. At the same time, there is a general lack of programmes aimed specifically at helping women, particularly in reducing the burden of the everyday tasks they must perform. The inferior economic and social position of women is frequently reinforced by social tradition, religion, or law.

Resolutions passed by the Conference called for recognition by international organizations and governments that women's importance to the development process should be taken into account in the formulating of development plans, and for the establishment and financing of research programmes within all relevant United Nations agencies to study the position and role of women in development and to formulate policies to encourage and expand their participation. Resolutions were also passed calling on relevant United Nations agencies to formulate a programme of specific action (e.g. education and training schemes), especially in the poorer countries and where women are socially disadvantaged, and calling on the United Nations, other international agencies, donor countries and all governments to provide funds for such projects.

Of particular relevance to rural women and the role of women in agriculture were the following items in the list of targets which the Conference felt should be achieved within an initial five-year period: significant extension of vocational training; establishment and increase of infrastructural services to women in rural areas; increased provision for comprehensive measures for health, education, nutrition and family planning; equality in remuneration and employment conditions; recognition of the economic value of female work (i.e. domestic food production, marketing and voluntary activities not traditionally remunerated); development of modern rural technology and cottage industry; and reduction of the heavy work load of women, particularly in rural sectors.

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2. THE SECOND UNITED NATIONS DEVELOPMENT DECADE: MID-TERM REVIEW AND APPRAISAL

Introduction

The inauspicious beginning of the Second United Nations Development Decade (DD2) has nowhere been more marked than in the vital food and agricultural sector. In contrast to the accelerated progress that was hoped for, the increase in production has in fact slowed down. Since 1972 the world food and agricultural situation has been more difficult and precarious than at any time since the years immediately following the Second World War.

Although agriculture received much emphasis in the International Development Strategy (IDS) adopted for DD2, only one quantitative target was specified for the agricultural sector. This called for an average annual increase of 4% in the agricultural production of the developing countries.[1] So far, however, in the first four years of the decade, production has increased by only 1.8% a year in these countries and by 2.1% in the world as a whole. The increase in the developing countries has been considerably less than their population growth of 2.4% a year.

The disappointing performance of agricultural production up to now in DD2 is partly because of longer term difficulties and inadequate policy action, but also to a great extent because of very widespread bad weather in two years (1972 and 1974) out of the four that have elapsed so far. As a result, the supply of several basic agricultural commodities has abruptly changed from a long familiar situation of surplus to shortage. World stocks of staple cereals have dropped to the lowest level for more than 20 years, a period during which the population has increased by about half, and food aid has shrunk just when it is most needed. Prices rose to unprecedented heights. Exceptionally rapid increases in agricultural production will be needed in the remaining years of the decade to meet the development target of a 4% average annual increase in production in the developing countries and to speedily reestablish a minimum degree of world food security.

Some of the main policy measures required in the agricultural sector were set out in the IDS as follows: "Developing countries will formulate, early in the decade, appropriate strategies for agriculture (including animal husbandry, fisheries and forestry) designed to secure a more adequate food supply from both the quantitative and qualitative viewpoints, to meet their nutritional and industrial requirements, to expand rural employment and to increase export earnings. They will undertake, as appropriate, reform of land tenure systems for promoting both social justice and farm efficiency. They will adopt the necessary measures for providing adequate irrigation, fertilizers, improved varieties of seeds and suitable agricultural implements. They will also take steps to expand the infrastructure of marketing and storage facilities and the network of agricultural extension services. They will make increasing provision for the supply of rural credit to farmers. They will encourage cooperatives for the organization of many of these activities. They will adopt appropriate agricultural pricing policies as a complementary instrument for implementing their agricultural strategies. Developed countries will support this endeavour by providing resources to developing countries for obtaining the essential inputs, through assistance in research and for the building of infrastructure and by taking into account in their trade policies the particular needs of developing countries. International organizations will also provide appropriate support." [2]

The Strategy calls for an average annual increase of "somewhat higher than 7%" in the exports of the developing countries, many of which depend heavily on agricultural products for their export earnings, and for a large number of specific measures of trade policy. "Levels of nutrition should be improved in terms of the average caloric intake and the protein content, with special emphasis being placed on the needs of vulnerable groups of population. . . . As part of their employment strategy, developing countries will put as much emphasis as

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[1] United Nations, *Resolutions adopted by the General Assembly during its twenty-fifth session, 15 September - 17 December 1970. Official records, twenty-fifth session, Supplement No. 28*, New York, 1971. Resolution 2626 (XXV), para. 16. A/8028.

[2] *Ibid.*, para. 75.

possible on rural employment." [3]

Progress in respect of these less quantitative objectives for the food and agricultural sector has been hardly more encouraging than the production performance, which in any case is essential for the achievement of the others. The general progress of the agricultural export earnings of the developing countries has continued to be unsatisfactory, in spite of temporary gains for some of them resulting from shortages and high prices. A particularly disquieting development is that the nutritional situation appears to have deteriorated since the beginning of the decade. There may also be a danger that the new emphasis on rural employment and on the problems of small farmers, which has come with the increased recognition of the social and distributional aspects of development, may now be replaced by renewed neglect, in view of the accentuated urgency of increasing food production and the fear of conflicts between production and employment objectives. Although the IDS included no specific target for external assistance to agriculture, the sector has suffered from the failure to meet the general targets specified for such assistance.[4]

The unsatisfactory performance of the food and agricultural sector has been closely linked with many profound changes in the wider economy, which could not be foreseen at the time when the IDS was adopted. Cyclical developments in the producing industry have led to a period of scarcity and high prices for the chemical fertilizers that are crucial for increasing agricultural production, and in particular for the green revolution technology in which such high hopes have been placed. Inflation and the disorganization of the world monetary system have enhanced speculation in agricultural commodities, and contributed to the erratic course of food and agricultural prices. Sharp increases in freight rates have added to the difficulties of paying for food and fertilizer imports. The rapid raising of petroleum prices since late 1973 has increased fertilizer production costs, as well as the price of the fuel required for irrigation pumps and farm machinery.

The year 1975 is therefore a particularly difficult and uncertain moment at which to attempt either to assess recent progress or to determine future strategies. Much attention is necessarily being concentrated at the present time on immediate problems, especially the need to ensure an adequate share of the available supplies of food and fertilizer, as well as help in purchasing them, for the countries most seriously affected by recent developments, through such arrangements as the United Nations Emergency Operation and the International Fertilizer Supply Scheme. Measures to meet such short-term problems and to restore some much-needed stability to the world economy must form an important part of any modifications in the international strategy.

Fortunately, the current preoccupation with the immediate difficulties in the food and agricultural sector has also brought a new concern for its underlying, longer term problems. It was this combined concern about immediate and longer term problems that led the United Nations General Assembly to decide, at its Twenty-Eighth Session in 1973, to convene a World Food Conference. The United Nations World Food Conference (WFC) was therefore held at Rome from 5 to 16 November 1974. It demonstrated a very encouraging degree of consensus, not only on the nature and dimensions of the world food problem, but also on the national and international measures needed to overcome it. The action taken in the light of its recommendations will be a major influence on progress during the rest of DD2 and beyond.

The resolutions adopted by the WFC have also introduced a much greater degree of precision in the Strategy that it is agreed is required for the food and agricultural sector. Many of its specific recommendations provide important new elements for addition to the IDS. Modifications in and additions to the strategy for the food and agricultural sector will also arise from the Declaration and Programme of Action on a New International Economic Order adopted by the United Nations General Assembly at its Sixth Special Session in 1974, and from the recommendations of the recent United Nations conferences on the human environment, on population, and on women. The new concepts of integrated rural development and of concentrating development programmes on small farmers also require recognition in the strategy. Certainly for the rest of DD2, increased food production in the developed countries will be of much greater importance for world food supplies than was envisaged when the Strategy was agreed. Indeed, the global interdependence in food production and trade is now much more apparent than at that time. There is, for example, no mention of food aid in the IDS.

The target of a 4% average annual increase in the agricultural production of the developing countries was based mainly on the objectives proposed in FAO's Provisional Indicative World Plan for Agricultural Development (IWP).[5] The IWP also proposed

[3] *Ibid.*, para. 18, 21-40, 66.
[4] *Ibid.*, para. 42-52.

[5] FAO, *Provisional Indicative World Plan for Agricultural Development*, Rome, 1969.

that the agricultural exports of the developing countries should increase by 3.3% a year. It provided a more detailed analysis than was available for any other major sector of the economy in the preparation of the IDS. The objectives proposed in the IWP have been broadly confirmed by the revisions, updating and other new work prepared for the WFC, as well as by the conclusions and recommendations of the Conference itself.

FAO has already prepared a preliminary review and appraisal of the progress of agricultural production in the developing countries in relation to the DD2 target and the objectives proposed in the IWP.[6] Benchmark surveys of the situation at the beginning of DD2 have also been made for two major areas, agricultural employment [7] and nutrition,[8] where up-to-date information is scarce and year-to-year changes tend to be small. The conclusions of both these surveys, and especially the new estimate that at least 460 million people suffer from a severe degree of protein-energy malnutrition, were used in FAO's contributions to the documentation for both the WFC and the United Nations World Population Conference. Part of the documentation for the WFC in fact consisted essentially of a review and appraisal of progress during the First United Nations Development Decade (DD1) and the first years of DD2, although not covering non-food agricultural products or forestry.[9] Several of the FAO Regional Conferences held in the second half of 1974 included preliminary discussions of progress during DD2. The latest in the series of periodic reports to the Economic and Social Council (Ecosoc) on progress in land reform is also intended as a contribution to the mid-term review and appraisal of DD2.[10] Other reviews of recent progress have covered agricultural education and training, and agricultural research.[11]

When review and appraisal was included as a new element in the approach to DD2, there were widespread hopes that systems could be established to cover a number of crucial elements of social and institutional progress that have hitherto largely escaped statistical capture. Although some improvements have been made, there is, at least in the food and agricultural sector, little of this new statistical material that is available for the mid-term review and appraisal of progress. Within FAO a major improvement has been the establishment of the Interlinked Computer System of Food and Agricultural Statistics. This has already made the basic statistical series of agricultural production, trade and consumption more timely and consistent, but series covering various important social and institutional aspects still remain to be added. Further improvements are expected to result from the systems of world food information and nutritional surveillance recommended by the WFC.

The mid-term review and appraisal of progress in the food and agricultural sector during DD2 that follows is on a world basis, although regional and country detail is included where possible. The main emphasis is on the first four years (1971-74) of DD2. This is, however, too short a period for the establishment of meaningful trends in most aspects of food and agriculture. Trends are therefore usually shown from 1961, the first year of DD1, to the latest year for which data are available, as well as for the period from 1971. Reference is made throughout to the relevant recommendations of the WFC. The concluding section discusses possible modifications in and additions to the international strategy for the food and agricultural sector for the rest of DD2, particularly in the light of these recommendations.

[6] Agricultural production in developing countries in relation to the targets of the Second United Nations Development Decade. *Monthly Bulletin of Agricultural Economics and Statistics (FAO)*, 22(4), April 1973, p. 1-17.
[7] FAO, *The state of food and agriculture 1973*, Rome, 1973, p. 127-174 (reprinted as *Agricultural employment in developing countries*, Agricultural Planning Studies No. 16, Rome, 1973).
[8] FAO, *The state of food and agriculture 1974*, Rome, 1975, p. 93-154.
[9] United Nations World Food Conference, *Assessment of the world food situation, present and future*, Rome, 1974. E/CONF.65/3.
[10] United Nations, *Progress in land reform: Sixth report* (in press).
[11] FAO, *The state of food and agriculture 1972*, Rome, 1972, p. 125-140, 141-164.

Production

Total world production of agricultural, fishery and forest products increased at an average annual rate of 2.6% between 1961 and 1974, in comparison with population growth of 2.0% a year (Table 2-1). In the more recent period 1970-74 the increase in production fell to 2.0% a year. The over-all total is dominated by agricultural production proper (crop and livestock production), which is estimated to account for roughly 90% of the total value of production. Fishery production increased somewhat faster

TABLE 2-1. — WORLD AGRICULTURAL, FISHERY AND FORESTRY PRODUCTION IN RELATION TO POPULATION GROWTH, 1961-74 AND 1970-74 AVERAGES

	Average annual increase [1] 1961-74	1970	1971	1972	1973	1974 [2]	Average annual increase [1] 1970-74
	Percent [3]	..... *1961-65 average = 100*					*Percent* [3]
TOTAL PRODUCTION	2.6	120	124	124	130	130	2.0
Agriculture [4]	2.6	120	125	124	130	131	2.1
Fisheries [5]	4.3	139	143	144	148	155	2.5
Forestry [6]	1.8	114	116	117	120	118	1.0
POPULATION	2.0	114	117	119	121	124	1.9
PER CAPUT PRODUCTION	0.6	105	107	105	107	106	0.1
Agriculture [4]	0.6	105	107	105	107	106	0.2
Fisheries [5]	2.3	122	123	124	122	125	0.5
Forestry [6]	—0.1	100	100	99	99	96	—0.9

[1] Minus sign denotes decrease. — [2] Preliminary. — [3] Exponential trend. — [4] Crops and livestock. — [5] Excluding China. — [6] Roundwood, including fuelwood.

than the total, and forestry production somewhat more slowly.

Trends in world and regional food and agricultural production (crops and livestock) are shown in more detail in Table 2-2. In the longer period from 1961 to 1974 the increase in production has been approximately the same in the developed and developing countries, although there have been big differences between the individual regions and countries in each group. During the first four years of DD2, however, the increase in the developing countries has not only been much below the longer term trend, but also much slower than in the developed countries, where the longer term trend has been broadly maintained.

By far the largest increase over the longer period has been in eastern Europe and the U.S.S.R., where plan targets call for a very rapid expansion of agricultural production. The smallest has been in North America, where the still very large potential for expansion was held back until recently by restrictions designed to balance supply with demand and reduce the surplus stocks accumulated earlier. The last of these restrictions were removed in the United States at the end of 1972, although not in time to affect the important winter wheat crop harvested in 1973. In the developing countries, where a faster increase in agricultural production is a universal aim of national development plans, the average annual increase in 1961-74 has varied from 2.4% in Africa to 3.2% in the Near East, in all cases well below the DD2 target of 4%. Only in the case of food production in the Near East has the increase in 1970-74 equalled the longer term trend during the whole period 1961-74.

Effects of the weather on agricultural production

The course of production during the first four years of DD2 has been very much affected by the weather. In the developing countries the generally high rates of increase that had been sustained since 1967 already began to fall off in 1971. In the Far East, which contains almost 30% of the world's population, production increased by between 4 and 6% in each of the four years 1967-70, largely as a result of a run of good weather combined with the rapid introduction of the green revolution technology. Already in 1971, however, there was no increase in agricultural production in this region and in Latin America.

Bad weather was particularly widespread in 1972, when food and agricultural production fell slightly in the world as a whole. This decline was almost certainly the first in the whole long period since the Second World War. Production declined in each of the developed regions except eastern Europe and the U.S.S.R., although in the U.S.S.R. itself there was a very sharp drop. In the developing countries in 1972 there was a big decline in production in the developing market economies of the Far East and a smaller one in China and the other Asian centrally planned economies.

The weather generally improved in 1973 and there were big recoveries in production in many areas. There was widespread drought in Africa and the Near East, however, and production fell in both these regions in 1973.

In view of the persistence of the food shortages,

TABLE 2-2. — WORLD AND REGIONAL FOOD AND AGRICULTURAL PRODUCTION, 1961-74 AND 1970-74 AVERAGES [1]

Region	Average annual increase 1961-74	1970	1971	1972	1973	1974 [2]	Average annual increase 1970-74
	Percent [3]	..... *1961-65 average = 100*					*Percent* [3]
Agricultural production							
DEVELOPED MARKET ECONOMIES [4]	2.1	113	120	119	122	124	2.1
North America	1.8	109	119	118	120	119	2.0
Western Europe	2.3	116	121	119	125	130	2.5
Oceania	2.4	120	123	122	127	123	0.8
EASTERN EUROPE AND THE U.S.S.R.	3.5	129	132	133	147	146	3.6
Total developed countries	2.6	119	124	124	131	132	2.7
DEVELOPING MARKET ECONOMIES [4]	2.6	123	124	125	128	131	1.6
Africa	2.4	121	123	124	121	127	0.8
Far East	2.6	124	124	122	132	129	1.4
Latin America	2.6	122	122	125	126	132	1.9
Near East	3.2	124	127	138	130	143	3.1
ASIAN CENTRALLY PLANNED ECONOMIES	2.8	122	126	124	131	134	2.2
Total developing countries	2.7	123	125	125	129	132	1.8
World	2.6	120	125	124	130	131	2.1
Food production [5]							
DEVELOPED MARKET ECONOMIES [4]	2.3	116	123	122	126	128	2.3
North America	2.2	113	124	122	124	124	1.9
Western Europe	2.3	117	121	119	125	130	2.5
Oceania	3.0	121	127	126	140	137	3.5
EASTERN EUROPE AND THE U.S.S.R.	3.5	130	132	133	148	146	3.6
Total developed countries	2.8	121	126	126	134	135	2.8
DEVELOPING MARKET ECONOMIES [4]	2.7	124	125	125	129	131	1.5
Africa	2.4	121	124	124	121	127	0.7
Far East	2.5	124	125	121	132	128	1.2
Latin America	2.8	124	125	127	128	135	1.9
Near East	3.2	124	127	138	130	143	3.2
ASIAN CENTRALLY PLANNED ECONOMIES	2.7	122	125	124	130	133	2.1
Total developing countries	2.7	123	125	125	129	132	1.7
World	2.7	121	126	125	131	132	2.1

NOTE: FAO index numbers of agricultural production are calculated by applying regional weights, based on 1961-65 farm price relationships to the production figures, which are adjusted to allow for quantities used for feed and seed and for waste.

[1] Crops and livestock only. — [2] Preliminary. — [3] Exponential trend. — [4] Including countries in other regions not specified. — [5] Crop and livestock production, excluding tobacco, inedible oilseeds, animal and vegetable fibres, and rubber.

particularly of basic cereals, that had begun in 1972, special efforts were made in virtually all countries to achieve a very large increase in food production in 1974. But these efforts were to a great extent vitiated by the weather, and on this occasion there were additional difficulties because of the shortage and high price of fertilizers. Although bad weather was less widespread in 1974 than in 1972, it particularly affected the two regions which, for different reasons, are the most important for world food supplies. Production declined in 1974 both in the Far East, which contains most of the world's malnourished people, and in North America, which is the largest exporter of food and agricultural products. There were also declines in production in eastern Europe and the U.S.S.R., and in Oceania.

There was a small rise in food and agricultural production at the world level in 1974. But cereal production declined as in 1972, and the increase in world food and agricultural production appears to be mainly the result of a sharp expansion of livestock slaughterings, most notably in western Europe. It has thus contributed little to the food supplies of the poorest people. Moreover, the increased slaughterings reflect serious difficulties in the livestock industry.

The very marked effect of the weather on food and agricultural production in the first years of DD2 has led to much speculation that there may have been climatic changes, and in particular that a cyclical period of drought similar to that in the 1930s may be beginning in North America. The World Meteorological Organization (WMO) concludes that climatic changes are occurring, and that there appears to be a trend toward more frequent extreme weather conditions in widely separated areas, so that certain areas have become more susceptible to the climatic vagaries of drought, flood and temperature extremes. In the Sahelian zone of Africa, for example, the rainy season extended further to the north from the 1920s to the 1960s, and seasonal rainfall has been much below average in the past six years or so.[12]

Studies by both WMO and FAO, however, suggest that there has been no significant change in the magnitude or frequency of fluctuations in crop yields and production in recent years.[13] But these studies were unable to isolate the influence of the weather, and thus only show that the combined effects of the weather, policy changes and all other factors affecting the variability of production have tended to balance one another out at the global level.

Even if there is no evidence that production fluctuations resulting from the weather have worsened at the global level in recent years, there is little doubt that their effects are now much greater and more widely felt. Formerly such fluctuations were to a large extent absorbed domestically in many countries by reductions in consumption or by the slaughter of livestock in years of shortage. There is now, understandably, greater reluctance to absorb fluctuations in this way, and an increasing tendency to attempt to maintain consumption levels and livestock herds by recourse to imports. Since international trade is so much smaller than production, the fluctuations in trade are even more pronounced.

It also appears that agricultural technology may not be properly attuned to the weather and to climatic conditions. The WFC called for increased work on the identification of agriculturally significant changes in weather patterns, and for improved monitoring of weather conditions in order to make it more relevant to agricultural needs.[14]

Food production and population

The roughly similar course of food and agricultural production in the developed and developing countries in 1961-74 appears in a completely different light when viewed against the rate of population growth. The population of the developing countries is not only increasing much faster (2.4% a year in these countries as a whole and 2.7% a year in the developing market economies) than in the developed countries today (0.9% a year), but also much faster than it ever increased in these countries during their development period. In a number of developing countries population growth is now more than 3.5% a year.

Thus per caput food production rose by 1.8% a year in the developed countries in 1961-74, but by only 0.3% a year in the developing countries (Table 2-3). And in 1970-74 per caput food production in the developing countries actually fell by about 0.6% a year. Although, as discussed later, this fall in per caput production will not, as a result of changes in international trade, have been fully reflected in per caput food consumption levels, its effects in the many countries where food supplies depend largely on domestic production will be readily apparent. In both Africa and the Far East per caput food production in 1974 was about 6% less than in 1970.

It is a considerable achievement that in 1961-74 the increase in food production in the developing

[12] United Nations World Food Conference, *Assessment of the world food situation, present and future*, Rome, 1974, p. 35. E/CONF. 65/3.

[13] *Ibid.*, p. 35-36.

[14] United Nations, *Report of the World Food Conference*, New York, 1975, p. 14. E/CONF. 65/20.

countries as a whole slightly exceeded a rate of population growth that is unprecedented in history. However, in the shorter period of the first four years of DD2 the increase in food production has been less than population growth in each of the developing regions except the Asian centrally planned economies, where population growth has already slowed down considerably, and the Near East. And even in the longer period of 1961-74, there was no increase in per caput food production in Africa, the Far East and Latin America.

There are also many individual developing countries where food production has failed to keep up with population growth even over the longer period since 1961. Out of the 96 developing countries for which data are available in Appendix 2-A, the increase in food production in 1961-74 failed to equal population growth in 45 countries, or almost half of the total, representing nearly 40% of the total population of the developing countries.

Population growth is estimated to account for about 70% of the annual increase in the demand for food in the developing countries and 55% in the developed countries. Paradoxically, at the world level it accounts for about 80% of the increase in food demand, because the slow increase in population in the developed countries is accompanied by a much higher level of per caput demand than the much more rapid population growth in the developing countries. The rest of the increase in food demand comes from increases in income, a large part of which are used in developing countries for increased food consumption, especially among the poorer consumers.

In the 86 developing countries for which relevant data are available in Appendix 2-A, the increase in food production in 1961-74 failed to equal the estimated increase in domestic demand for food, stemming from both population growth and increased income, in no less than 58 countries, or about two thirds of the total. As a result of this shortfall of production behind demand in so many developing countries, their food imports have increased very steeply.

Such comparisons of trends in production, population and demand in individual countries should be treated with some caution. Much depends on such factors as the position at the beginning of the period covered, the extent to which food production is for export, and so on. Not all countries are aiming or could or should aim at self-sufficiency in their food supplies. However, most developing countries are aiming to increase their self-sufficiency, and very few

TABLE 2-3. — WORLD AND REGIONAL FOOD PRODUCTION PER CAPUT, 1961-74 AND 1970-74 AVERAGES [1]

Region	Average annual increase [2] 1961-74	1970	1971	1972	1973	1974 [3]	Average annual increase [2] 1970-74
	Percent [4]	..... *1961-65 average = 100*					*Percent* [4]
DEVELOPED MARKET ECONOMIES [5]	1.3	108	114	111	114	115	1.3
North America	1.0	104	113	110	111	110	1.0
Western Europe	1.5	110	114	111	116	120	1.8
Oceania	1.2	106	109	107	117	113	1.9
EASTERN EUROPE AND THE U.S.S.R.	2.5	121	122	122	135	132	2.8
Total developed countries	1.8	112	117	115	121	121	1.9
DEVELOPING MARKET ECONOMIES [5]	—	103	102	99	99	99	—1.1
Africa	—0.1	102	101	99	94	96	—2.0
Far East	—	104	102	91	103	97	—1.3
Latin America	—0.1	102	100	98	97	99	—1.0
Near East	0.3	102	101	107	98	105	0.1
ASIAN CENTRALLY PLANNED ECONOMIES	0.8	107	108	105	108	109	0.4
Total developing countries	0.3	105	104	101	102	102	—0.6
World	0.7	106	108	105	108	107	0 2

[1] Crop and livestock production, excluding tobacco, inedible oilseeds, animal and vegetable fibres, and rubber. — [2] Minus sign denotes decrease. — [3] Preliminary. — [4] Exponential trend. — [5] Including countries in other regions not specified.

of them, if any, are aiming at a reduction in self-sufficiency. Thus when these comparisons are used, as above, in aggregate form, they provide a significant indication of what is occurring in the developing countries as a whole.

The situation is even more disquieting if the levels as well as the trends of per caput food production are taken into consideration. The developed countries, with only about 30% of the total population, account for about 60% of the world's food production. The level of per caput food production in the developing countries fell from 33% of that in the developed countries in 1961-63 to 30% in 1971-73.

Food and population relations were extensively discussed at the World Population Conference. The World Food Conference also passed a resolution on the achievement of a desirable balance between population and food supply, which "calls on all governments and on people everywhere not only to make every possible effort to grow and equitably distribute sufficient food and income so that all human beings may have an adequate diet, but also to support, for a longer-term solution, rational population policies ensuring to couples the right to determine the number and spacing of births, freely and responsibly, in accordance with national needs within the context of an overall development strategy." [15]

Agricultural production in relation to DD2 and national targets

It is clear that agricultural production in the developing countries as a whole and in each of the developing regions has lagged far behind the DD2 target of an average annual increase of 4%, and that the lag has been even greater in the first years of DD2 than in the previous decade. The major exception at regional level is the Far East in 1967-70, when in a remarkable spurt in production the increase was 4% or more in each of the four years.

Obviously the 4% target was not intended to apply to each developing country or even region, but is an average figure for the developing countries as a whole. Moreover, it was not expected to be reached in a single jump, but by a gradual acceleration of growth rates during the course of the decade. However, progress to date has slowed down instead of accelerating, and has been so far behind the target that it now seems highly improbable that the increase in production can be accelerated sufficiently for the rate of 4% to be reached as an average for the decade. This would require an average annual increase of 5.3% in the six remaining years of the decade.

[15] *Ibid.*, p. 11.

TABLE 2-4. — AVERAGE ANNUAL INCREASE IN AGRICULTURAL PRODUCTION IN DEVELOPING REGIONS IN COMPARISON WITH IWP OBJECTIVES

Region	Actual increase in production		IWP objectives	
	1961-74	1970-74	1961-63 to 1975	1975-85
	..... *Percent per year* [1]			
Africa south of the Sahara	2.3	0.8	3.2	3.3
Far East	2.6	1.4	3.6	4.0
Latin America	2.6	1.9	3.0	3.1
Near East and northwest Africa [2]	3.2	2.8	3.4	3.5
Average	2.6	1.7	[3] 3.4	[3] 3.7

NOTE: The regional groupings cover the 64 countries studied in the IWP: 24 in Africa south of the Sahara (84 % of regional population), eight in the Far East (80 %), 17 in Latin America (90 %), and 15 in the Near East and northwestern Africa (96 %). Thus, although they cover most of the population of the developing market economies, the data in this table are not fully comparable with those in the other tables in this document.

[1] Exponential trend. — [2] Objectives for northwestern Africa based on 1965. — [3] These figures are those derived from the four IWP regional studies; the final IWP objectives in the world study, based on faster growth rates for pig and poultry production, raised these rates to 3.6 % and 3.9 % respectively (3.7 % over the whole period).

The DD2 target was mainly based on the objective of an average annual increase of 3.7% in the developing countries from 1961-63 to 1985 proposed in the IWP.[16] The slightly higher figure of 4% resulted mainly because there was already by the beginning of DD2 a shortfall from the IWP objectives, so that a faster rate was needed in the future if they were still to be met, and because the IDS was based on a higher projection of gross domestic product (GDP) than that used in the IWP. The objectives proposed in the IWP and related studies for four developing regions and shown separately for 62 individual countries therefore constitute a rough breakdown of the over-all target by regions and countries against which to measure progress.

Table 2-4 compares the regional increases in production in 1961-74 and 1970-74 with the IWP objectives for 1961-63 to 1975 and 1975 to 1985. There have been very substantial shortfalls from these objectives in both Africa south of the Sahara and the Far East. In Latin America and in the Near East and northwestern Africa the shortfalls were comparatively small over the longer period. It should be noted, however, that where there has been criticism of these objectives, this has usually been that they are too low. In fact, partly to meet these objections, a new study of South America was subsequently carried out, and this arrived at alternative objectives of 3.6% and

[16] FAO, *Provisional Indicative World Plan for Agricultural Development*, Rome, 1969.

TABLE 2-5. — GROWTH OF AGRICULTURAL PRODUCTION IN COMPARISON WITH TARGETS IN NATIONAL DEVELOPMENT PLANS

Region and country	Plan Period	Rate of growth of agricultural production	
		Planned	Actual
		..... *Percent per year*	
AFRICA			
Algeria	1970-73	4.5	1.5
Cameroon	1961-65	2.2	8.3
	1966-71	3.5	4.4
	1971-76	4.0	[1] 1.4
Central African Rep.	1967-70	6.0	1.6
Dahomey	1966-70	4.6	4.2
Ethiopia	1968-73	3.1	1.4
Gabon	1966-70	3.7	3.2
Ivory Coast	1967-70	3.8	1.9
	1971-75	4.1	[1] 3.2
Kenya	1970-74	4.5	1.4
Lesotho	1970-74	3.1	2.6
Mali	1970-72	4.5	—6.6
Mauritius	1971-75	4.0	[1] 2.8
Morocco	1965-67	1.5	—1.7
Niger	1965-68	3.3	2.5
	1967-70	3.4	—0.8
Nigeria	1970-74	3.0	—2.0
Rwanda	1966-70	3.8	5.1
Senegal	1965-69	5.4	—1.3
	1969-73	5.9	—4.0
Tanzania	1969-74	4.5	1.0
Togo	1966-70	3.3	1.5
	1971-75	6.6	[1] —5.0
Tunisia	1965-68	2.8	—
	1969-72	5.1	10.9
	1973-76	5.8	[2] —3.6
Uganda	1966-71	5.1	3.3
	1972-76	4.8	[3] —1.2
Zambia	1972-76	6.0	[3] 5.3
FAR EAST			
Bangladesh	1973-78	4.6	[2] —8.5
Burma	1966-70	6.0	4.2
Cambodia	1968-72	4.5	—7.7
India	1961-66	5.4	—0.5
	1969-74	4.5	1.0
Korea, Rep. of	1962-66	5.2	5.1
	1967-71	5.0	4.0
	1972-76	4.5	[3] 1.6
Malaysia	1961-65	2.8	4.5
	1966-70	5.5	7.9
	1971-75	[3] 6.9	[1] 6.5
Nepal	1965-70	3.6	2.2
Pakistan [4]	1960-65	2.7	[5] 3.9
	1965-70	5.7	5.0
	1970-75	5.5	[6] 1.8
Philippines	1963-67	3.0	3.4
	1967-70	5.5	3.7
	1971-74	6.2	4.7
FAR EAST (*cont'd*)			
Sri Lanka	1972-76	4.9	[3] 2.8
Thailand	1961-67	3.0	4.1
	1967-71	4.3	5.7
	1972-76	5.1	[3] 4.6
Viet-Nam, Rep. of South	1962-66	3.7	—2.4
LATIN AMERICA			
Argentina	1965-69	4.2	4.3
Barbados	1969-72	2.6	—6.2
Bolivia	1962-71	6.3	3.8
Chile	1967-71	3.5	0.6
Colombia	1970-73	5.4	2.4
Costa Rica	1965-68	7.1	7.7
Cuba	1971-75	10.0	[1] 2.0
Dominican Rep.	1962-69	5.6	1.4
	1970-74	5.6	4.4
Ecuador	1964-73	6.6	1.7
	1973-77	5.3	[2] 0.4
El Salvador	1973-77	5.0	5.3
Guatemala	1971-75	4.8	[1] 4.9
Honduras	1965-69	4.6	5.4
Nicaragua	1965-69	6.4	0.6
Panama	1969-72	8.0	1.6
Paraguay	1971-75	5.3	[1] 3.9
	1972-71	5.0	[3] 5.5
Peru	61/63-70	5.6	2.1
	1971-75	4.0	[1] —1.0
Surinam	1972-76	7.1	[3] 4.7
Trinidad and Tobago	1969-73	5.0	1.2
Uruguay	1965-74	4.2	—
Venezuela	1970-74	6.1	4.3
NEAR EAST			
Afghanistan	1969-71	3.5	—7.7
	1972-76	4.2	[3] 6.1
Cyprus	1967-71	8.5	4.3
	1972-76	7.0	[3] 1.8
Iran	1968-72	5.0	1.3
Iraq	1970-74	7.0	2.7
Lebanon	1972-77	5.0	[3] 2.8
Libya	1973-75	16.0	[2] 0.6
Saudi Arabia	1971-75	4.9	[1] 3.8
Sudan	1971-75	10.0	[1] 2.4
Syria	1971-75	5.1	[1] 5.9
Turkey	1968-72	4.4	4.2
	1973-77	4.5	[2] 12.5

SOURCE: National development plans and FAO index numbers of agricultural production.
[1] 1971-74. — [2] 1973-74. — [3] 1972-74. — [4] Including Bangladesh. — [5] 1961-65. — [6] 1970-74.

5.0% a year for 1970-80.[17] Even the low alternative is considerably above both the IWP objectives for Latin America and the actual production performance.

The proposed production objectives for 62 individual countries are shown separately in the IWP and related studies (Appendix 2-B). The actual rate of increase in agricultural production in 1961-74 equalled or exceeded the objective for 1975 (or 1985

[17] FAO, *Perspective study of agricultural development for South America* (provisional version), Rome, 1972.

where there is only a single objective) in only 23 countries, or about a third of the total. The IWP and related objectives range from 1.3% for Gabon in 1975-85 to 5.3% for Honduras and Nicaragua in 1970-90.

In 1970-74 the number of countries where the IWP objectives were equalled or exceeded fell to 19. However, it is noteworthy that the rate of increase in agricultural production was faster in 1970-74 than in 1961-74 in 34 of the 96 developing countries covered in Appendix 2-B.

The agricultural production targets in national development plans are generally more ambitious than the objectives proposed in the IWP. The targets in 95 current and recent plans for 64 countries shown in Table 2-5 range from 1.5% a year in Morocco for 1965-67 to 16.0% in Libya for 1973-75, and no less than 68 of them call for increases of 4% or more a year. These plan targets have been met in only 20 cases, or about one fifth of the total.

Revised indicative goals for the annual increase in food production in the developing regions were proposed to the WFC. These involved a minimum rate of increase of 3.6% a year up to 1985 in the developing market economies as a whole, 3.8% in Africa, 3.4% in the Far East, 3.6% in Latin America and 4.0% in the Near East.[18] Except for the Far East, these goals are higher than the objectives proposed in the IWP.[19] It was recognized that they would still fall short of the DD2 target of 4% a year, which would correspond to the demand projections based on a faster growth of GDP. The WFC reaffirmed the need "to achieve a minimum agricultural growth rate of 4% per annum" in the developing countries.[20] Although there was much discussion of the role of the developed countries in world food supplies, the WFC, like the IDS, set no specific goals for the increase in production in these countries.

Production of main agricultural commodities

It is not possible to discuss in detail here the developments that have occurred in the production of each of the main agricultural commodities. It is necessary, however, to refer briefly to the main developments in cereal production and livestock production and to their interrelations, and to some other commodities where trends have been particularly striking. Brief reference will also be made to a number of success stories in respect of particular commodities in individual developing countries.

Table 2-6 shows trends in 1961-74 and 1970-74 in the production of 27 main commodities or commodity groups. For all except 12 of them (rice, maize, soybeans, total vegetable oils and oilseeds, tea, coffee, tobacco, cotton, sisal, natural rubber, pigmeat and milk), world production increased more slowly in 1970-74 than over the whole period 1961-74. World production of starchy roots, pulses, groundnuts, cocoa, jute, wool, and mutton and lamb showed a negative trend in 1970-74. Only wheat, citrus fruit, cotton, natural rubber and poultry meat increased by 4% or more a year in 1961-74 in the developing countries.

The main cause of the present difficult world food situation has been the recent developments in the production of cereals, which account for about 30% of total world food production. The annual increase in cereal production of 2.5% in 1970-74 has been less than the increase in demand, so that world stocks have been sharply reduced.

Total world cereal production has fallen twice in the four years of DD2 that have so far elapsed, by 36 million tons in 1972 and about 42 million tons in 1974. The seriousness of such drops in production is readily apparent when it is recalled that an increase of about 21 million tons is now required each year simply to meet population growth at existing levels and patterns of consumption. World cereal production was less than 20 million tons greater in 1974 than in 1971. Production had already fallen in 1965, but by only about 4 million tons, and this at a time when stocks were still very large.

The cereals situation is complicated by the fact that a large proportion of world production is not consumed directly by human beings but is fed to livestock and thus consumed indirectly, with substantial energy losses in conversion. The cereals fed to livestock rose from about 320 million tons (30% of world production) in 1964-66 to about 420 million tons (35% of world production) in 1969-71. All but a very small quantity was used for livestock feeding in the developed countries, where the increase was from about 280 million tons in 1964-66 to about 370 million tons in 1969-71. It is estimated that almost half of this increase was in eastern Europe and the U.S.S.R.

The developed countries, with about 30% of the population, thus accounted for about 50% of the total world consumption of cereals for all uses in 1969-71. The 370 million tons of cereals fed annually to livestock in these countries during this period was greater than the total human consumption of cereals in China and India together. This indicates the con-

[18] United Nations World Food Conference, *The world food problem: proposals for national and international action*, Rome, 1974, p. 26, 33. E/CONF.65/4.

[19] They also refer only to food production, while the IWP objectives cover total agricultural production.

[20] United Nations, *Report of the World Food Conference, op. cit.*, p. 4.

TABLE 2-6. — PRODUCTION OF MAIN AGRICULTURAL COMMODITIES, 1961-74 AND 1970-74 AVERAGES

Commodity	Average annual increase [1] 1961-74	1970	1971	1972	1973	1974 [2]	Average annual increase [1] 1970-74
	Percent [3]	..... *Million metric tons*					*Percent* [3]
Wheat	3.6	318.3	354.0	346.8	377.3	360.2	3.2
Developed countries	3.1	222.5	259.7	233.6	269.8	250.8	3.1
Developing countries	4.7	95.8	94.3	113.2	107.5	109.4	3.4
Rice (paddy)	1.3	306.8	306.5	295.8	324.5	323.2	1.3
Developed countries	1.6	23.6	21.6	22.8	24.0	25.3	1.8
Developing countries	0.8	283.2	284.9	273.0	300.5	297.9	1.3
Maize	2.0	262.0	305.7	305.4	310.4	293.0	2.8
Developed countries	3.9	161.4	205.3	202.7	208.7	188.3	3.1
Developing countries	1.1	100.4	100.4	102.7	101.7	104.7	1.1
Millet and sorghum	2.4	92.5	96.8	88.1	101.3	93.1	0.1
Developed countries	2.2	21.0	26.8	25.1	30.0	21.3	0.1
Developing countries	2.4	71.5	70.0	63.0	71.3	71.8	0.4
Total cereals	2.9	1 211.8	1 315.2	1 278.7	1 376.0	1 333.9	2.5
Developed countries	2.8	618.3	709.8	687.2	753.3	705.4	3.4
Developing countries	3.0	693.5	605.4	691.5	622.7	628.5	1.4
Starchy roots	1.3	562.3	552.4	535.1	575.2	559.9	—0.1
Developed countries	—0.4	259.6	238.7	230.0	260.4	235.6	—2.5
Developing countries	2.9	302.7	313.7	305.1	314.8	324.3	1.7
Pulses	1.2	44.7	43.7	43.5	44.2	44.1	—0.3
Developed countries	2.9	12.4	11.5	11.4	12.5	13.3	1.8
Developing countries	0.5	32.4	32.3	32.1	31.7	30.8	—1.3
Sugar (centrifugal)	3.0	73.3	75.0	74.3	78.3	78.7	1.8
Developed countries	2.3	33.6	35.4	35.6	36.1	34.0	0.3
Developing countries	3.5	39.7	39.6	38.7	42.2	44.7	3.0
Bananas	3.7	33.2	33.8	34.8	35.5	35.8	1.9
Developed countries	1.9	0.7	0.8	0.7	0.8	0.7	—0.4
Developing countries	3.8	32.5	33.0	34.1	34.7	35.1	2.0
Citrus fruit	4.8	37.4	39.7	41.2	43.1	43.7	4.0
Developed countries	5.1	21.1	22.0	24.2	25.7	25.2	4.6
Developing countries	4.4	16.3	17.7	17.0	17.4	18.5	3.2
Groundnuts	1.5	18.4	19.3	15.9	17.1	17.6	—1.1
Developed countries	5.3	1.9	2.0	2.1	2.0	2.4	6.3
Developing countries	1.0	16.5	17.3	13.8	15.1	15.2	—2.1
Soybeans	1.8	46.5	48.5	52.3	62.3	56.8	5.1
Developed countries	4.6	31.8	33.1	35.6	43.4	34.9	2.3
Developing countries	—1.3	14.7	15.4	16.7	18.9	21.9	10.5
Total vegetable oils and oilseeds [4]	2.9	35.5	36.9	36.3	39.4	38.9	3.8
Developed countries	3.2	14.8	15.2	15.3	17.7	15.9	3.0
Developing countries	2.6	20.7	21.7	21.0	21.7	23.0	3.9
Cocoa (beans)	1.7	1.5	1.6	1.5	1.4	1.5	—0.7
Tea	3.1	1.3	1.3	1.5	1.6	1.6	3.4
Developed countries	2.9	0.1	0.1	0.2	0.2	0.2	3.3
Developing countries	3.1	1.2	1.2	1.3	1.4	1.4	3.5
Coffee	0.4	3.9	5.0	4.7	4.1	4.9	6.1
Tobacco	2.6	4.6	4.5	4.9	5.0	5.2	3.1
Developed countries	1.8	2.0	1.9	2.0	2.1	2.2	1.3
Developing countries	3.3	2.6	2.6	2.9	2.9	3.1	4.4
Cotton (lint)	2.4	12.0	12.5	13.3	13.4	13.7	3.1
Developed countries	1.2	4.9	4.9	5.7	5.6	5.6	3.7
Developing countries	4.1	7.1	7.6	7.6	7.8	8.1	3.2
Jute [5]	0.2	3.6	3.4	3.6	4.2	3.4	—1.0
Sisal [5]	1.1	0.6	0.6	0.6	0.7	0.8	2.2
Rubber (natural)	4.4	2.9	3.0	3.1	3.4	3.5	5.6
Wool (greasy)	—	2.8	2.8	2.7	2.6	2.5	—2.7
Developed countries	—	2.1	2.1	2.1	1.9	1.9	—3.1
Developing countries	—	0.7	0.7	0.6	0.7	0.6	—1.3
Beef and veal [6]	2.8	40.2	39.8	39.8	40.2	42.4	1.4
Developed countries	4.9	27.5	27.8	27.9	28.1	30.8	2.6
Developing countries	—0.7	12.7	12.0	11.9	12.0	12.0	—1.4
Mutton and lamb [7]	0.7	7.2	7.2	7.2	7.0	7.0	—0.7
Developed countries	0.2	3.8	3.9	4.0	3.5	3.7	—1.1
Developing countries	1.0	3.4	3.3	3.2	3.5	3.3	—0.5
Pigmeat	2.9	37.1	39.8	40.5	40.6	42.5	3.5
Developed countries	3.1	24.9	27.3	27.6	27.3	29.0	3.9
Developing countries	2.5	12.2	12.5	12.9	13.3	13.5	2.6
Poultry meat	5.3	17.8	18.6	19.8	20.1	20.7	3.9
Developed countries	5.1	12.8	13.4	14.3	14.5	14.8	3.5
Developing countries	5.5	5.0	5.2	5.5	5.6	5.9	4.3
Milk (total)	1.6	396.3	399.5	407.5	414.1	424.4	1.8
Developed countries	1.4	318.9	319.0	325.6	331.4	339.2	1.6
Developing countries	2.2	77 4	80.5	81.9	82.7	85.2	2.5

[1] Minus sign denotes decrease. — [2] Preliminary. — [3] Exponential trend. — [4] Oil equivalent. — [5] Including allied fibres. — [6] Including buffalo meat. — [7] Including goat meat.

siderable scope that exists for the more rational and equitable distribution of world cereal supplies in times of shortage. The rapid increase in the feeding of cereals to livestock has in fact fallen off since the present period of shortage began in 1972. There was a moderate decline in the feeding of cereals to livestock in western Europe in 1974 and a drastic decline in the United States.

The main cause has been the very sharp rise in prices. The increase in cereal prices (and also of soybean prices) has been accentuated by the concurrent shortage of alternative sources of concentrated livestock feed. Supplies of fishmeal have been drastically reduced since the virtual disappearance of the anchoveta from the fishing grounds off the west coast of South America in 1972.

As already noted, most of the increase in agricultural production in western Europe in 1974 came from very heavy livestock slaughterings. This reflected the earlier expansion of cattle numbers, an upturn in pigmeat production, and the unprofitability of fattening livestock at the current price relationships for feedstuffs and livestock products. At the same time, there has been no benefit for consumers, since consumer prices for livestock products remain very high, and the demand for them has therefore slackened. The livestock industry is thus in a very difficult situation.

In the developing countries the performance of livestock production has on the whole been somewhat more satisfactory than that of crop production, possibly reflecting the generally greater vulnerability of crop production to adverse weather. In the developing countries covered in the IWP [21] both livestock and crop production increased in 1961-74 by 2.6% a year. In 1970-74, however, livestock production increased slightly faster than crop production. In the Far East and Latin America the increase in livestock production in 1961-74 approximatively equalled the objectives proposed in the IWP for 1961-63 to 1975, and the rather low objective for the Near East and northwestern Africa was actually exceeded. In the total developing countries covered in the IWP, the increase of 2.6% a year in livestock production in 1961-74 came quite close to the proposed objective of 2.9% for 1961-63 to 1975. However, it was considerably below the revised objective of 4.1% a year up to 1985 proposed in the IWP world study on the basis of faster growth rates for pig and poultry production through the feeding of greater quantities of the large increase in cereal production that was expected to materialize.

The increase of 2.6% a year in crop production in 1961-74 represents a substantial shortfall from the objective of 3.5% a year proposed in the IWP for 1961-63 to 1975. There have, however, been some notable successes in the production of particular crops in individual countries. Some of these are shown in Table 2-7. These have necessarily had to be chosen somewhat arbitrarily, but a main criterion was that the country in question should be a fairly large producer of the particular crop.

But even these success stories contain some disappointing features. Most of them concern export crops rather than staple foods for domestic consumption, and have been achieved on large commercial farms rather than on small farms, and by extending the cultivated area rather than by raising yields. This is particularly true of soybean production in Argentina, Brazil and Mexico, which shows the most spectacular increases of all. In each of these countries soybeans were virtually a new crop in 1961, and high export prices relative to other crops have encouraged a very rapid increase in plantings on large, mechanized farms. Soybeans also had the advantage that, although they replaced cotton and grains to some

TABLE 2-7. — AVERAGE ANNUAL GROWTH IN PRODUCTION, AREA AND YIELD OF SELECTED CROPS IN SELECTED DEVELOPING COUNTRIES, 1961-74

Crop	Production	Area	Yield
	..... *Percent per year* [1]		
Wheat			
Brazil	13.4	10.6	2.6
India	8.2	3.6	4.4
Rice			
Pakistan	7.1	1.9	5.2
Venezuela	7.2	3.2	3.8
Maize			
Thailand	10.8	10.2	0.5
Sorghum			
Argentina	12.5	10.0	2.3
Mexico	21.4	20.6	0.6
Soybeans			
Argentina	36.9	32.9	3.0
Brazil	28.6	24.8	3.1
Mexico	23.8	26.6	—1.8
Palm oil			
Malaysia (West)	20.1	17.9	1.9
Cocoa beans			
Ivory Coast	7.5	4.0	3.4
Papua-New Guinea	7.0	7.0	—
Tea			
Kenya	11.9	9.2	2.4
Uganda	13.6	8.8	4.5

[1] Exponential trend; minus sign denotes decrease.

[21] See Table 2-4.

extent, they could also in some cases be taken as a second crop after wheat.

In the case of maize in Thailand, additional factors were a long-term contract with, and technical assistance from an importing country, Japan. However, the expansion in production came mainly from small farmers on new land cleared from scrubland and forest. The increase in wheat production in Brazil has been mainly the result of high prices offered as part of a programme of import substitution, but it has come almost entirely from large, mechanized farms.

In these circumstances, the cases of wheat in India and rice in Pakistan are particularly outstanding, in that the spectacular increases in the production of these staple food crops have been achieved to a great extent through increased yields on small and medium-sized farms. These long-sustained, rapid increases are among the greatest successes so far of the green revolution technology, based on the use of high-yielding varieties combined with fertilizers and assured water supplies. The increases were even greater in the period between the introduction of the high-yielding varieties and the recent years of bad weather. For example, wheat production in India rose by 10.6% a year in 1967-71.

In contrast, many of the more disappointing production performances of recent years reflect the lack of a green revolution technology for particular conditions or for a particular crop. To quote the case of India again, most of the rice crop (in contrast to Pakistan) is produced in rainfed areas and therefore cannot benefit much from the existing high-yielding varieties. Rice production in India increased by only 0.9% a year in 1961-74. The production of pulses has suffered from competition for land from crops like wheat, for which high-yielding varieties are available, and declined by 2.0% a year in 1961-74.

Some of the main factors affecting the rate of increase in agricultural production in the developing countries will be discussed in more detail in connexion with production resources and rural institutions and services.

Fishery production

As indicated in Table 2-1, world fishery production increased much faster than agricultural and forestry production in both 1961-74 and 1970-74. Since the price-weighted index of fishery production shown in that table is available only at the world level, more detailed analysis must be based on unweighted figures of the total catch of fish.

Mainly because of lower landings from the south-east Pacific anchoveta fishery, there were sharp falls in the world catch of fish in 1969 and again in 1972. Although there was a sharp recovery in 1974, the

TABLE 2-8. — WORLD AND REGIONAL CATCH OF FISH, CRUSTACEANS AND MOLLUSCS, 1961-74 AND 1970-74 AVERAGES

Region	Average annual increase [1] 1961-74	1970	1971	1972	1973	1974 [2]	Average annual increase [1] 1970-74
	Percent [3]	..... *Million metric tons*					*Percent* [3]
DEVELOPED MARKET ECONOMIES [4]	2.8	26.3	26.4	26.6	27.4	27.2	1.1
North America	—0.2	4.2	4.1	3.8	3.8	3.8	—2.4
Western Europe	2.6	11.0	11.0	11.2	11.3	11.1	0.5
Japan	4.5	9.4	9.9	10.3	10.7	10.7	3.4
Oceania	4.8	0.2	0.2	0.2	0.2	0.2	4.1
EASTERN EUROPE AND THE U.S.S.R.	8.3	8.2	8.4	8.9	9.8	10.8	7.2
Total developed countries	4.0	34.5	34.8	35.5	37.2	38.0	2.6
DEVELOPING MARKET ECONOMIES [4]	3.9	27.5	26.8	21.3	19.9	22.5	—6.8
Africa	7.6	2.8	2.9	3.4	3.4	3.4	5.8
Far East	6.8	8.4	9.0	9.4	10.3	10.7	6.4
Latin America	—0.3	15.6	14.0	7.6	5.2	7.4	—22.0
Near East	9.5	0.6	0.6	0.6	0.7	0.7	—5.3
ASIAN CENTRALLY PLANNED ECONOMIES	3.6	8.0	8.6	8.7	8.7	8.8	1.9
Total developing countries	3.7	35.5	35.4	30.0	28.6	31.3	—4.5
World	3.8	70.0	70.2	65.5	65.8	69.3	—0.8

Minus sign denotes decrease. — [2] Preliminary. — [3] Exponential trend. — [4] Including countries in other regions not specified.

TABLE 2-9. — CATCHES OF FOOD AND NON-FOOD FISH, 1961-74 AND 1970-74 AVERAGES

	Average annual increase 1961-74	1970	1971	1972	1973	1974 [2]	Average annual increase [1] 1970-74
	Percent [3]	..... *Million metric tons*					*Percent* [3]
FOOD	3.3	43.5	44.7	45.1	47.3	48.7	2.8
Developed countries	1.9	23.3	22.9	22.7	23.9	24.3	1.3
Developing countries	5.0	20.2	21.8	22.4	23.4	24.4	4.5
NON-FOOD	5.0	26.5	25.5	20.4	18.5	20.6	—7.9
Developed countries	9.3	11.3	11.9	12.9	13.4	13.7	5.2
Developing countries	0.3	15.2	13.6	7.5	5.1	6.9	—22.6

[1] Minus sign denotes decrease. — [2] Preliminary. — [3] Exponential trend.

rate of growth of the world catch was reduced to 3.8% in 1961-74 (from previous rates of 5 to 6%), and in 1970-74 there was an average annual decline of 0.8% (Table 2-8). Apart from lower catches from the southeast Pacific, which caused the total Latin American catch in 1973 to fall to only a third of that in 1970, catches in the northwest Atlantic have levelled off in the early 1970s, and in the southeast Atlantic they have not yet exceeded the peak level of 1968.

Changes in the world catch of fish have in recent years been principally influenced by the catches of shoaling pelagic species used mainly for reduction to fishmeal and oil, particularly in the fisheries of Angola, Chile and Peru. It is these species that brought much of the rapid increase in production in the 1960s and that have also been responsible for the recent lack of growth. Probably as a combined result of heavy fishing and hydrographical changes, catches of anchoveta off the west coast of South America have been drastically reduced in recent years, and fishing has been suspended for long periods. There is now evidence of recovery in this stock, and 1975 catches are expected to be considerably more than double the low point reached in 1973.

However, the increase in the production of fish for direct human consumption has continued, with only a slight slackening in the rate of growth from 3.3% a year in 1961-74 to 2.8% in 1970-74 (Table 2-9). Whereas the share of the developing countries in the production of fish destined for livestock feed has fluctuated in line with the developments discussed above, their share of world production of food fish has increased to about 50%. The production of food fish has increased much more rapidly in the developing than in the developed countries.

Although on a global basis fish remain a small part of total food supplies, they are a major element in the diet in many areas, and in countries such as Congo, Indonesia, Japan, the Philippines and the Republic of South Viet-Nam fish consumption exceeds that of meat. Fish directly consumed accounted for 5.6% of protein supplies in 1971 (14% of animal protein), as compared with 4.3% in 1960. To this must be added the indirect contribution made through fishmeal used for livestock production.

The current level of catches of marine fish, crustaceans and molluscs is about half of the 110 to 120 million tons that it is estimated can potentially be sustained annually. The degree of exploitation, however, varies from area to area and from species to species. The waters of northern temperate latitudes are already rather heavily fished, and many of the more familiar species, such as cod and similar fish, flat fish, salmon, lobster, shrimp and large tuna, are unlikely to yield much larger catches. Fishing effort is therefore gradually being diverted to less heavily exploited areas, such as the northwest Indian Ocean, and to less familiar types of fish.

Landings of food fish from fresh waters have also increased and the recorded catch is now over 9 million tons a year. Developments have been somewhat uneven, but declines because of heavy fishing (as in the Kavirondo Gulf in Kenya) or natural causes (as in the rivers of the Sahelian zone of Africa) have been more than offset by increased fishing effort on underexploited stocks. Production from fish culture has also expanded, especially through greater yields per unit area. Commercial interest and capital investment in fish culture are increasing, and an accelerated growth in production may be expected in the future.

Forestry production

Table 2-1 indicated that forestry production increased more slowly than either agricultural or fishery production both in 1961-74 and in the more recent

TABLE 2-10. — PRODUCTION OF INDUSTRIAL ROUNDWOOD, 1961-74 AND 1970-74 AVERAGES

	Average annual increase 1961-74	1970	1971	1972	1973	1974 [1]	Average annual increase 1970-74
	Percent [2]	..... *Million cubic metres*					*Percent* [2]
Developed countries	1.5	1 072	1 082	1 084	1 110	1 091	0.4
Developing countries	3.8	206	213	224	237	223	2.0
World	1.9	1 278	1 295	1 308	1 347	1 314	0.7

[1] Preliminary. — [2] Exponential trend.

period 1970-74. The index of roundwood production given in that table, however, underestimates the real growth in the forestry sector, since about half of the world production of about 2 500 million cubic metres of roundwood consists of fuelwood. The production of fuelwood can only be roughly estimated, but it has declined quite rapidly in the developed countries and appears still to be slowly increasing in the developing countries, despite some substitution by alternative fuels.

If industrial roundwood production is considered separately (Table 2-10) it shows much greater dynamism, although the growth rate was considerably reduced by a decline in production in 1974, as a result of lower demand caused by the general economic recession. World production of industrial roundwood increased by 1.9% a year in 1961-74 and 0.7% in 1970-74. Only 17% of industrial roundwood is produced in the developing countries. However, because of the rapid growth both of processing industries and of the export of logs, the production of industrial roundwood increased by 3.8% a year in the developing countries in 1961-74, as compared with 1.5% in the developed countries. The effect of the lower demand in 1974 was particularly marked in the developing countries, because of the large part of this production that is for export.

Because of increasing efficiency in the use of wood raw material, world production of all the major categories of processed forest products except sawnwood has increased much faster than industrial roundwood production (Table 2-11). Sawnwood production increased considerably faster in the developing than in the developed countries in 1961-74, but the rate of growth was reduced in 1970-74 by virtual stagnation in Africa and Latin America. By 1974 the devel-

TABLE 2-11. — PRODUCTION OF PROCESSED FOREST PRODUCTS, 1961-74 AND 1970-74 AVERAGES

Product	Average annual increase 1961-74	1970	1971	1972	1973	1974 [1]	Average annual increase 1970-74
	Percent [2]	..... *Million cubic metres*					*Percent* [2]
Sawnwood	1.4	411	427	438	444	417	0.4
Developed countries	1.2	359	373	383	388	364	0.3
Developing countries	2.8	52	54	56	56	53	0.5
Wood-based panels	8.5	70	78	87	96	93	7.4
Developed countries	8.1	64	71	79	87	83	6.7
Developing countries	13.2	6	7	8	9	10	13.6
		..... *Million metric tons*					
Woodpulp	5.1	104	105	111	116	120	4.9
Developed countries	5.0	101	101	107	112	115	3.3
Developing countries	7.8	3.5	3.7	4.0	4.3	5.3	10.9
Paper and paperboard	5.3	128	130	139	148	150	4.0
Developed countries	5.2	118	119	127	135	139	4.2
Developing countries	6.2	10	11	12	12	11	2.5

[1] Preliminary. — [2] Exponential trend.

oping countries still accounted for only 13% of world sawnwood output.

It is in the rapidly growing wood-based panels industry that the developing countries have shown the most striking rates of expansion. Developments in the veneer and plywood industries have favoured countries producing large-sized quality logs. Growth has been particularly rapid in the Far East, where the wood-rich countries of Southeast Asia supply raw materials for industries in developing countries of East Asia and in Japan. This region was sharply affected by the recession in demand that began in 1974.

From about the middle of 1973, however, world consumption of sawnwood and wood-based panels has declined rapidly, following a year or so of very heavy demand. The producing industries have been very adversely affected in both developed and developing countries.

The developing countries account for less than 5% of world production of woodpulp, but this too has been expanding faster than in the developed countries. The production of paper and paperboard, for which woodpulp is a basic raw material, also expanded faster in the developing countries until recently. A large and growing share of the developing countries' production of paper and paperboard (37% in 1973) is for export to other developing countries.

World demand for paper and paperboard grew very rapidly from 1972 until the onset of the current recession. This followed a slack period in 1971 and early 1972 which had discouraged the establishment of new mills. The industry was therefore only partly able to meet the increased demand, and it was the developing countries, which account for only 8% of world output, that suffered the most serious lack of essential supplies. Although the present slackening in demand has lessened the risk of a worsening shortage, the consequent constraints on investment in new manufacturing capacity may still have serious effects on the availability of paper for educational programmes.

International trade

The first four years of DD2 have brought sharp changes in international trade in agricultural products, reflecting the highly unsettled conditions in the world economy. Apart from the difficult food production situation, major influences have been the fluctuations in economic activity and demand in the developed countries, the accelerating inflation in these countries, and the adjustment problem arising from higher oil prices.

Main recent developments

Economic growth in the developed countries averaged only 2.6% in 1970 and 3.7% in 1971, or considerably less than the average of 4.8% a year during the 1960s. Prices, on the other hand, rose by 5.9% in 1970 and 5.4% in 1971, or much faster than the average of 3.4% during the 1960s. In 1972 economic growth accelerated sharply, and there was a simultaneous economic boom in almost all of the developed countries that lasted until the middle of 1973. Meanwhile, inflation continued to accelerate, with a new boost from the rapid rise in food prices in world markets that began in the second half of 1972, and continued until the end of 1974.

Since the middle of 1973 there has been a sharp reversal in the rate of economic growth, and the GNP of major developed countries fell by over 1% in 1974. The rate of inflation has been further accelerated by the sharp increases in oil prices since the end of 1973, reaching 14% in 1974 in the Organisation for Economic Co-operation and Development (OECD) member countries.

These abrupt changes have brought serious difficulties for many of the developing countries. Many of them benefited temporarily from the earlier booming economic conditions in the developed countries, which are the main markets for their agricultural exports, and their agricultural export earnings increased very steeply in 1973. Now, however, their export earnings are suffering from the effects of the economic stagnation in these main markets, thus compounding their problems of adjustment to higher prices for essential imports. Their export earnings, and particularly agricultural export earnings, have generally not kept pace with the rapidly rising cost of their imports, especially of food, fertilizers and oil.

In recognition of the difficulties of the countries most seriously affected by these developments, the United Nations Emergency Operation was established in May 1974 to mobilize resources for those with extreme balance of payments problems. Parallel activities have included the International Fertilizer Supply Scheme, and the consultations of the Director-General of FAO with the main exporting and im-

porting countries in order to assess and obtain resources to meet the uncovered cereal import needs of the most seriously affected countries.

In the food and agricultural sector, the most far-reaching developments in international trade have concerned the basic cereals that form a major part both of world food supplies and of the world trade in food. Serious difficulties began with the very sharp rise in import demand that resulted from the widespread poor cereal harvests of 1972. The U.S.S.R. alone purchased 15.9 million tons of cereals in world markets in 1972 and 24.2 million tons in 1973, in comparison with only 3.6 million tons in 1971. World trade in rice was limited by the scarcity of exportable supplies, thus increasing the demand for wheat and other cereals. Stocks of cereals declined abruptly to dangerously low levels, and prices rose steeply to bring import demand in line with the lower exportable supplies. The pressure on cereal prices was accentuated by the simultaneous shortage and high price of alternative sources of concentrated feed for livestock, such as soybeans and fishmeal. Prices of cereals and other products have subsequently fallen, but they remain much higher than before.

Agricultural exports

The IDS calls for an average annual increase of more than 7% in the exports of the developing countries. There is no specific target for agricultural exports, but the IWP proposed that the agricultural exports of the developing countries should increase by 3.3% a year. This would imply an increase of 10 to 12% a year in non-agricultural exports if the over-all target were to be met.

The value of the agricultural exports of the developing countries increased by 8.2% a year in 1961-74 and 19.9% a year in 1970-74 (Table 2-12). However, these impressive increases very largely reflect higher prices. The United Nations index of export prices indicates that agricultural prices as a whole increased by 30% a year between 1970 and the first quarter of 1974, since when they have tended to decline. In 1973 they were about double the 1970 level, with about half the increase coming in 1973 itself.

Table 2-12 indicates that in volume terms (weighted by 1961-65 prices), the agricultural exports of the developing countries increased by only 1.9% a year in 1961-74, and that in 1970-74 the rate of increase fell to 0.6%. Both these figures are not only well below the IWP objective of 3.3%, but are also less than the growth of population.

The share of agricultural products in the export earnings of the developing countries dropped from 44.5% in 1961-63 to 36.1% in 1972-74 (Table 2-13). Although a decline in this share is to be expected as non-agricultural exports are expanded in the course of economic development, the speed with which the decline has occurred also reflects the very slow growth of agricultural exports. The share of agriculture in the GDP of the developing countries fell from 32% in 1960 to 26% in 1970.[22]

The agricultural exports of the developed countries have increased much faster than those of the developing countries, and also increased faster in 1970-74 than in 1961-74. The increase in value accelerated

[22] Based on data for 60 countries (FAO, *The state of food and agriculture 1973*, Rome, 1973, p. 218-222).

TABLE 2-12. — VALUE AND VOLUME OF AGRICULTURAL EXPORTS, 1961-74 AND 1970-74 AVERAGES

	Average annual increase [1] 1961-74	1970	1971	1972	1973	1974 [2]	Average annual increase [1] 1970-74
	Percent	*1961-65 average = 100*					*Percent*
VALUE							
Developed countries	11.5	141	157	189	293	358	26.0
Developing countries	8.2	126	125	142	199	260	19.9
World	10.1	134	143	169	251	315	24.0
VOLUME							
Developed countries	4.4	132	139	151	168	160	4.9
Developing countries	1.9	116	115	122	127	119	0.6
World	3.3	124	127	137	149	141	3.3

[1] Compound interest. — [2] Preliminary.

from 11.5% a year in 1961-74 to 26.0% in 1970-74, and that in volume from 4.4% to 4.9%. The developed countries thus increased their share of the total value of world agricultural exports from 55.5% in 1961-63 to 63.9% in 1972-74. The Asian centrally planned economies slightly increased their share during this period, but there was a drop in all other developing regions, and especially in the Far East.

Of the competing products grown in both developed and developing countries that account for about 80% of world agricultural trade, the developed countries obtain about two thirds of their imports from other developed countries, and this proportion has been increasing. Only non-competing tropical food products maintained their position in the 1960s and early 1970s, but even here advances in one developing region have often been at the expense of others. Raw materials fell from 29% of the agricultural exports of the developing countries in 1961-63 to 24% in 1971-73, reflecting substitution by synthetics and other technological developments, and they are likely to suffer particularly severely from the current recession in economic activity in the developed countries. Agricultural raw materials (especially fibres) have derived very little competitive benefit from the steep rise in costs of synthetic substitutes that followed the raising of oil prices.

TABLE 2-13. — REGIONAL SHARES OF WORLD AGRICULTURAL EXPORTS, 1961-63 AND 1972-74 AVERAGES

Region	Share of value of world agricultural exports	
	1961-63	1972-74
	..... *Percent*	
DEVELOPED MARKET ECONOMIES[1]	47.6	57.9
North America	19.7	23.1
Western Europe	17.6	26.1
Oceania	8.2	7.1
EASTERN EUROPE AND THE U.S.S.R.	7.9	6.0
Total developed countries	55.5	63.9
DEVELOPING MARKET ECONOMIES[1]	42.7	33.7
Africa	9.1	6.5
Far East	12.5	8.3
Latin America	17.1	15.4
Near East	3.7	3.2
ASIAN CENTRALLY PLANNED ECONOMIES	1.8	2.4
Total developing countries	44.5	36.1
World	100.0	100.0

[1] Including countries in other regions not specified.

World trade in processed agricultural products has continued to expand rapidly. The value of processed products averaged about $11 800 million in 1967-69, or about a third of the total value of trade in food, feedstuffs and beverages. However, the most rapid growth has been in the developed countries, and the share of the developing countries in the total exports of processed food, feedstuffs and beverages fell from 19% in 1969 to about 16% in 1973. Most of the rapid growth in the production of processed products in the developing countries has been for their own domestic markets. Moreover, the recent high prices on world markets have tended in some cases to encourage immediate sales of certain products in unprocessed form.

Although many developing countries have substantially increased their agricultural export earnings during the first four years of DD2, the gains have been very unevenly distributed among them, depending on the commodity composition of their exports. The value of agricultural exports increased by 15% a year in Africa in 1970-74, but by 19 to 23% a year in each of the other developing regions.

This situation mainly reflects the different price developments for particular commodities. Prices of wheat, rice, oilcakes and meals, wool and sisal more than doubled in 1973, and there were increases of 70 to 80% for barley, maize, fats and oils, cocoa, cotton and rubber. However, beef prices rose by only about 25%, and bananas, butter, citrus fruit, tea and jute did not share in the price boom.

The terms of trade of agricultural exports appear to have retained most of the gains made when prices rose so sharply in 1973. The United Nations index of export prices indicates that in 1974 the prices of food and of agricultural raw materials were more than twice as high as in 1970. Although oil prices were three to four times the 1970 level, those of manufactured goods were only about 40% higher in 1974 than in 1970.

Preliminary data for 1974 indicate that although the increase in the value of the agricultural exports of the developing countries was less than in 1973, it was greater than the increase in the value of the agricultural exports of the developed countries. This was largely due to some extraordinary price increases, particularly for sugar. The volume of world agricultural exports declined in 1974. Exports of agricultural raw materials were adversely affected by slackening demand in the developed countries. By the end of 1974 the prices of most agricultural products had begun to recede from earlier peak levels.

The WFC devoted considerable attention to problems concerning the agricultural export earnings of the developing countries. Its recommendations will

be summarized in the discussion of international trade policies.

Food imports

The lag of food production behind domestic demand in many developing countries has not only slowed down the growth of their agricultural exports, but has greatly increased their dependence on food imports. The volume of their food imports increased by 4.4% a year in 1961-74 and the increase accelerated to 6.2% a year in 1970-74 (Table 2-14).

The food imports of the developed countries, which are far larger than those of the developing countries, have also increased rapidly in recent years. The sharp rise of 7% in the volume of world food imports in 1972 was entirely the result of increased imports into the developed countries. These countries' food imports rose by 9% in 1972 and 6% in 1973, largely reflecting the heavy cereal purchases by the U.S.S.R. after the very poor harvest of 1972. In the developing countries most of the increase was in 1973, when their food imports climbed by 17%.

A large part of the food imports of the developing countries consists of cereals, which are the staple food of most of them. Many developing countries that were net cereal exporters before the Second World War have gradually become net importers during the last 20 years, while the United States and Canada have emerged as the main cereal exporters. Between 1949-51 and 1966-68 the gross cereal imports of the developing countries rose from 12.4 to 34.4 million tons; they rose to 40 million tons in 1973 and 1974.[23] In value terms these imports increased from $2 000 million in 1961 to $3 300 million in 1967, fell to $3 200 million in 1972, and rose to $6 000 million in 1973 and $10 400 million in 1974.

The food imports of the developing countries averaged 14% of their total imports in 1970-72. Gross imports represented about 10% of their total cereal supplies in 1972, and the figure was as high as 14% in Africa and Latin America. While the food imports of the developing countries remain considerably smaller than their exports of food and agricultural products, they are coming steadily to represent a larger share. They increased by 12.2% a year in value in 1961-74 and 32% in 1970-74, in comparison with increases of 8.2% and 19.9% in the value of their exports. The problems of the developing countries in paying for these increased food imports have also been enhanced by the steep rise in maritime freight rates, which on average are estimated to have increased about fourfold between the first quarter of 1972 and the second quarter of 1974, although they have subsequently declined.

In the 1960s and at the beginning of the 1970s the burden of paying for these increasing imports was greatly mitigated by food aid, which provided up to 45% of the total cereal imports of the developing countries in peak periods and averaged about 30% in 1970-72. Food aid, however, dropped sharply in

[23] Excluding China, for which figures for the earliest period are not available.

TABLE 2-14. — VALUE AND VOLUME OF FOOD IMPORTS, 1961-74 AND 1970-74 AVERAGES

	Average annual increase [1] 1961-74	1970	1971	1972	1973	1974 [2]	Average annual increase [1] 1970-74
	Percent	..... *1961-65 average = 100*					*Percent*
VALUE							
Developed countries	11.0	148	162	189	264	329	22.0
Developing countries	12.2	131	144	159	249	393	32.0
World	11.3	144	158	182	261	344	24.0
VOLUME							
Developed countries	3.7	128	133	145	154	145	3.2
Developing countries	4.4	128	134	136	159	163	6.2
World	3.9	128	133	142	155	149	3.9

[1] Compound interest. — [2] Preliminary.

1972/73 and was further reduced in 1973/74. Food aid in cereals (the main item), which was 10 to 16 million tons annually from 1962/63 to 1971/72, fell to about 7 million tons in 1973/74. This fall reflects not only the shortage of supplies but also the fact that, with higher prices and freight rates, only greatly reduced quantities could be purchased and shipped with the funds committed for food aid. Total food aid fell by only about 1% at current prices in 1973, but in real terms the fall was as much as 57%.[24] The recommendations of the WFC concerning food aid are discussed later in connexion with international policies.

The possible future cereal import requirements of the developing market economies were examined in the documentation prepared for the WFC.[25] If the trends in production since 1961 were to continue, and if demand grew as projected, the net cereals deficit of these countries would rise from an average of 16 million tons in 1969-71 to almost 85 million tons by 1985. Hence the emphasis of the action proposals made to the WFC and of the recommendations of the WFC itself on the urgent need to accelerate the increase in the food production of the developing countries.

Trade in fishery products

Although the market for some important fishery products is now depressed, the total volume and value of world trade has continued to grow during DD2. Trade in products for human consumption has steadily expanded, but the sharp drop in landings in Chile and Peru in 1972 and the low catches since then have sharply curtailed the value of trade in fishmeal, in spite of record prices.

Earnings from exports of fishery products from

[24] Organisation for Economic Co-operation and Development, *Development cooperation, 1974 review*, Paris, November 1974, p. 87.

[25] United Nations World Food Conference, *Assessment of the world food situation, present and future*, Rome, 1974, p. 89. E/CONF. 65/3.

TABLE 2-15. — VALUE AND VOLUME OF EXPORTS OF FISHERY PRODUCTS, 1961-74 AND 1970-74 AVERAGES

Region	Average annual increase[1] 1961-74	1970	1971	1972	1973	1974[2]	Average annual increase[1] 1970-74
	Percent[2]	..... *1961-65 average = 100*					*Percent*[2]
VALUE							
Total developed countries	11.5	165	187	231	317	336	19.5
Africa	9.5	154	173	204	355	336	21.5
Far East	20.4	284	349	479	760	790	29.1
Latin America	10.5	228	249	225	195	242	1.5
Near East	9.6	156	169	211	268	305	18.9
Total developing countries[4]	13.7	226	257	301	355	387	14.4
World[4]	12.0	179	206	248	329	351	18.3
VOLUME							
Total developed countries	3.3	122	125	138	140	135	2.6
Africa	5.1	131	141	167	212	190	9.8
Far East	10.5	180	198	235	326	317	15.2
Latin America	—1.2	164	168	160	83	99	—11.8
Near East	3.8	101	107	102	150	170	13.9
Total developing countries[4]	6.0	155	167	185	175	180	3.8
World[4]	4.0	130	135	149	148	145	2,8

[1] Minus sign denotes decrease. — [2] Compound interest. — [3] Preliminary. — [4] Excluding Asian centrally planned economies.

developing countries have shown markedly different growth rates from region to region (Table 2-15). Most rapid of all has been the growth in exports from Far Eastern countries (due mainly to crustaceans and fresh fish), which increased nearly tenfold from 1961 to 1974. In all other developing regions, however, the increase has been less rapid than the growth of exports from developed countries, the total value of which was some five times higher in 1974 than in 1961. In the world as a whole the average annual increase in the value of exports was 12.0% in the period 1961-74, and the recent price boom has increased this rate to 18.3% in 1970-74, in spite of a very sharp drop in the volume of exports from Latin America in 1973. Preliminary data indicate that the increase in the value of exports dropped to about 7% in 1974.

The main trade flows have remained the same as in the 1960s. Shipments of fresh, frozen and canned fish products between developed countries continue to be the largest in value. Developing countries have retained their dominance in the export trade in crustacean products, particularly fresh and frozen shrimp. Angola, Chile and Peru share a large part of the fishmeal and fish oil market with Iceland, Norway and South Africa.

Trade in forest products

Although the production of forest products tends to follow fairly closely the levels of economic activity, particularly in the construction industry, in developed countries world trade in forest products has expanded more rapidly because of increasing shortages in many countries (Table 2-16).

The share of the developing countries in world trade in forest products rose from 9% in 1961-63 to 14% in 1970-74. The value of their exports of forest products rose by 15.6% a year in 1961-74 and by 23.0% a year in 1970-74, in comparison with increases of 11.8% and 21.0% in the developed countries. In terms of volume, the faster rate of increase in the exports of the developing countries than in those of the developed countries has been even more striking. This reflects the fact that a very large proportion of the exports of the developing countries is still in the form of unprocessed logs. However, their exports of all major categories of processed forest products, including sawnwood, wood-based panels, pulp and paper, have all grown much faster than those of developed countries.

In the single year 1973 the exports of forest products of the developing countries increased by 21% in volume and 78% in value. The largest expansions in both the volume and value of exports have been in the Far East and the Asian centrally planned economies, with broad-leaved logs, sawnwood, veneer and plywood the main commodities. As noted in discussing production, however, world consumption of sawnwood and of wood-based panels has declined rapidly from about the middle of 1973, and the whole forestry sector has suffered from the economic recession in the developed countries. Preliminary data indicate that the increase in the value of world exports of forest products dropped from about 43% in 1973 to 22% in 1974, while the volume of exports fell slightly.

TABLE 2-16. — VALUE AND VOLUME OF EXPORTS OF FOREST PRODUCTS, 1961-74 AND 1970-74 AVERAGES

	Average annual increase [1] 1961-74	1970	1971	1972	1973	1974 [2]	Average annual increase [1] 1970-74
	Percent	..... *1961-65 average = 100*					*Percent*
VALUE							
Developed countries	11.8	177	182	216	300	383	21.0
Developing countries	15.6	227	246	291	518	534	23.0
World	12.2	182	189	223	319	388	21.0
VOLUME							
Developed countries	5.8	154	153	168	185	185	4.6
Developing countries	10.7	225	239	268	324	308	11.0
World	6.5	163	164	180	200	198	4.9

[1] Compound interest. — [2] Preliminary.

Cereal supplies and stocks

Because of their importance in world food supplies, not only directly but also in livestock feeding, developments in cereal supplies have repercussions almost throughout the food and agricultural sector. Many of the biggest changes that have occurred in this sector during the first four years of DD2 have been centred in this basic group of commodities. This brief section therefore brings together the main recent developments in world cereal supplies, with particular emphasis on the stock situation.

Cereal stocks are perhaps the area in which there have been the greatest changes in the food and agricultural sector during DD2. A main feature of the 1960s was the existence of large "surplus" stocks of cereals, mainly in North America, where they had accumulated since the early 1950s as an unwanted by-product of farm support programmes. These stocks were regarded as burdensome by the countries holding them. Other cereal exporters were concerned that they depressed prices and that their use for food aid interfered with commercial markets. While food aid undoubtedly brought important benefits to developing countries, there was also widespread concern that its ready availability encouraged them to neglect the need to develop their own agricultural production.

The IDS makes no mention of food aid, and the only reference to stocks, apart from buffer stocks in connexion with international commodity agreements, concerns the need to widen and reinforce the machinery for consultation on surplus disposal. Now, however, the situation has completely changed. Cereal stocks have been abruptly reduced, and are no longer sufficient to ensure a minimum degree either of world food security or of price stability. Thus there is now widespread agreement that one of the most urgent priorities for the rest of DD2 is the rapid rebuilding of stocks on a planned basis and with the burden of stock holding more equitably distributed than before.

At the close of the 1969/70 crop seasons, just before the beginning of DD2, the wheat stocks of the main exporting countries were at the highest level ever recorded, and their stocks of coarse grains and rice were also very large (Table 2-17). Two years later, mainly because of more effective supply management policies and the disease-affected maize crop in the United States in 1970, there had been some decrease in these stocks, but they remained very large and no immediate substantial reduction was foreseen.

With the widespread bad harvests of 1972, however, import demand rose very sharply. World trade in cereals increased from 108 million tons in 1971/72 to 130 million tons in 1972/73, or by 21%. The jump in import demand was met at a very large cost in terms of world food security. The cereal stocks of the main exporting countries were reduced by 38 million tons, or 35%. The reduction in stocks was even greater than the expansion in trade, because of the poor harvests in the major exporting countries themselves.

A very large part of the 22 million-ton increase in imports was accounted for by the U.S.S.R., whose cereal imports rose by almost 14 million tons, or about 170% over 1971/72. The repercussions of the greatly reduced 1972 cereal harvest in the U.S.S.R. in fact provide a striking example of what may be expected in an increasingly interdependent world food economy when the weather brings a big drop in the production of a major producing and consuming country. The fall of 13 million tons in the U.S.S.R. cereal crop in 1972 was only about 8% of the previous year's harvest, which is within the range of the fluctuations that must be expected because of the weather. But 13 million tons represented as much as 12% both of the total world trade in cereals in 1971/72 and of the stocks of the major exporters at the close of that season. Contrary to earlier policy, the U.S.S.R. decided not to curtail its livestock expansion programme as a result of the 1972 crop.

Because of the depletion of stocks, world cereal supplies in 1973/74 depended more heavily on the harvests of the current year, and thus to a great extent on the weather, than at any time since the years immediately following the Second World War. Although harvests were fortunately large in 1973, most of the increase was outside the main exporting countries (and particularly in the U.S.S.R.), so that their stocks were depleted by a further 18% in 1973/74, which took them to the lowest level since the close of the 1951/52 seasons. Thus in 1974/75 again world cereal supplies have depended precariously on the current crop. With the poor harvests of 1974 in the Far East and North America, and a fall in world cereal production for the second time in three years, the stocks of the major exporters are expected to fall by another 15% by the end of the 1974/75 seasons.

For the third year in succession, therefore, cereal supplies will in 1975/76 be determined almost entirely by the current crop, and the urgent rebuilding of stocks has had to be put off for yet another year. Stocks are now at dangerously low levels. The situation is so critical that special measures have had to be taken in order to try to ensure essential supplies for the most seriously affected countries.

The developments discussed above have been a

main factor in the very steep rise in world prices of agricultural products in DD2. By February 1974, United States wheat for export cost almost four times as much as in June 1972. Although the price has subsequently eased, in December 1974 it was still three times as high as in June 1972. For Thai rice the increase was even greater, and by April 1974 the price was more than four times as high as in June 1972. The United States maize price increased more than twofold. Cereal prices have fallen considerably since November 1974 but remain very high.

Table 2-18 presents FAO estimates of the level of total carry-over stocks of cereals, although these unfortunately do not include two of the largest producing and consuming countries, China and the U.S.S.R., for which no data on stocks are available.[26] These estimates indicate the crucial role of the stocks of the main exporting countries, which represented 72% of the total in 1969/70 and are still 54% of the much reduced total expected by the end of 1974/75. Changes in the stocks outside these countries have been much smaller, although in most cases they are lower than at the beginning of the decade. A striking example of a developing country that was able to build up quite a high level of stocks after a run of good harvests is India, where government stocks of foodgrains reached 9.5 million tons in mid-1972.

[26] China was reported to hold foodgrain stocks of about 40 millions tons in 1971, which would amount to about 16% of annual consumption.

World food security

A measure of the deterioration that has occurred in world food security is that total cereal stocks carried over into the new crop season have declined from 23% of total consumption (excluding China and the U.S.S.R.) at the close of the 1969/70 season to an expected 11% by the end of the current season (Table 2-18). FAO has estimated that total carry-over stocks of 17 to 18% of the annual world consumption of

TABLE 2-17. — WORLD CEREAL SUPPLIES, 1969/70 TO 1974/75

	1969/70	1970/71	1971/72	1972/73	1973/74	1974/75 [1]
	Million metric tons					
Wheat						
Production [2]	315.5	318.4	353.9	347.3	377.2	361.0
Imports [3]	48.1	52.6	52.6	67.6	63.1	62.7
Developed countries [4]	19.3	23.2	22.8	33.7	22.7	18.7
Developing countries	28.8	29.4	29.8	33.9	40.4	44.0
Closing stocks of main exporting countries [5]	65.1	50.1	48.8	29.0	25.9	24.4
Coarse grains [6]						
Production [2]	583.5	581.7	648.8	631.0	675.0	649.2
Imports	38.1	43.8	47.4	54.9	63.2	57.0
Developed countries [4]	34.0	38.9	40.9	45.4	49.7	44.4
Developing countries	4.1	4.9	6.5	9.5	13.5	12.6
Closing stocks of main exporting countries [7]	54.8	38.6	54.1	38.7	28.2	20.9
Rice (milled equivalent)						
Production [2]	197.2	205.7	205.9	197.4	216.3	214.5
Imports [2]	6.3	7.1	7.6	7.6	7.7	7.3
Developed countries	1.4	1.3	1.5	1.4	1.3	1.3
Developing countries	4.9	5.8	6.1	6.2	6.4	6.0
Closing stocks of main exporting countries [8]	9.7	8.9	6.1	3.7	4.2	3.8
Total cereals [9]						
Production	1 096.2	1 105.8	1 208.4	1 176.2	1 268.5	1 224.7
Imports	92.5	103.5	107.6	130.1	134.0	127.0
Developed countries	54.7	63.4	65.2	80.5	73.7	64.4
Developing countries	37.8	40.1	42.4	49.6	60.3	62.6
Closing stocks of main exporting countries	129.6	97.6	109.0	71.4	58.3	49.3

[1] Preliminary. — [2] Calendar years 1969 to 1974. — [3] Including wheat flour in wheat equivalent. — [4] Excluding trade within the EEC. — [5] Argentina, Australia, Canada, EEC, United States. — [6] Rye, barley, oats, maize, millet and sorghum, mixed grains. — [7] Argentina, Australia, Canada, South Africa, United States. — [8] Japan, Pakistan, Thailand, United States. — [9] See footnotes for wheat, coarse grains and rice; since rice is included in milled equivalent, the figures of total cereal production differ from those in Table 2-6.

cereals might be judged "a minimum safe level for food security." At 1974 consumption levels this would amount to 150 million tons outside China and the U.S.S.R. and 230 million tons for the world as a whole.[27]

In addition to a substantial acceleration in the increase in food production in the developing countries, the action proposals to strengthen world food security presented to the WFC included:

(*a*) the establishment of a food information and early warning system;

(*b*) a coordinated system of national stock policies embodied in an International Undertaking on World Food Security;

(*c*) better arrangements for meeting emergency requirements for food supplies; and

(*d*) the reorganization of food aid as a continuing form of relief and development assistance.[28]

A draft International Undertaking on World Food Security was submitted to the Seventeenth Session of the FAO Conference in November 1973 and a revised text was made available to the WFC. The WFC endorsed the objectives, policies and guidelines set out in the proposed international undertaking, and invited all governments to express their readiness to adopt them, and to cooperate in bringing the proposed undertaking into operation as soon as possible; it also called for assistance in the development and implementation of appropriate national food stocks policies in developing countries.[29] The WFC also resolved that a Global Information and Early Warning System on Food and Agriculture should be established; it requested FAO, in cooperation with the other organizations concerned, to formulate the necessary arrangements, called on "all governments to participate in the System and extend full cooperation, on a voluntary and regular basis, by furnishing as much current information and forecasts as possible," and requested that the information should be analysed and disseminated periodically to all par-

[27] United Nations World Food Conference, *The world food problem: proposals for national and international action*, Rome, 1974, p. 173. E/CONF.65/4.
[28] *Ibid.*, p. 165.

[29] United Nations, *Report of the World Food Conference, op. cit.*, p. 14-15.

TABLE 2-18. — ESTIMATED TOTAL CARRY-OVER STOCKS OF CEREALS, 1969/70 TO 1974/75 [1]

	Closing stocks					
	1969/70	1970/71	1971/72	1972/73	1973/74	1974/75 [2]
	Million metric tons					
Wheat						
Main exporting countries	65	50	49	29	26	25
Main importing countries	9	9	11	8	7	7
Others	7	5	7	6	6	7
Total	81	64	67	43	39	39
Rice						
Main exporting countries	10	9	6	4	4	4
Others	15	15	15	9	10	9
Total	25	24	21	13	14	13
Coarse grains						
Main exporting countries	54	39	54	39	28	21
Main importing countries	10	10	11	11	12	13
Others	9	7	8	8	7	7
Total	73	56	73	58	47	41
Total cereals	179	144	161	114	100	93
	Percent					
Proportion of total consumption	23	17	18	13	12	11

NOTE: FAO estimates, compiled from official and unofficial sources. For details, see Table 2-17.
[1] Excluding China and the U.S.S.R. — [2] Preliminary.

ticipating governments for their exclusive use.[30] The closely-related recommendations of the WFC concerning food aid will be discussed later in relation to food aid policies.

After the WFC, the International Undertaking on World Food Security was adopted at the Sixty-Fourth Session of the FAO Council in November 1974 and formally transmitted to governments inviting their adherence. A number of developing countries have established national cereal stock targets, and technical assistance missions have been sent to several of them. International discussions have been held on the technical and operational implications of world food security, and progress has been made in implementing the Global Information and Early Warning System.

[30] *Ibid.*, p. 14.

Food consumption and nutrition

It is not yet possible to assess in detail the effects on food consumption and nutrition of the most recent developments in production and trade discussed earlier. It is likely, however, that they have seriously worsened what was already a very disquieting nutritional situation in the developing countries.

The recent falls in per caput food production in these countries have to some extent been mitigated by further increases in imports. But, because of the shortage and high price of the supplies available for import, actual supplies of food per caput must also have declined in many countries. In widely separated areas, from the Sahelian zone of Africa, parts of southern Africa and Ethiopia, to parts of Asia, those who produce largely for their own subsistence have suffered from successive crop failures. Among urban consumers, even where there has been no serious physical shortage of supplies, rapid increases in prices have caused severe hardship for the poorer people who have to spend a high proportion of their incomes on food.

Most of the present knowledge of nutritional problems has had to be derived from national average figures of per caput food supplies, because of the inadequate number of reliable household consumption, budgetary and clinical surveys. While still far from adequate, the limited available information is, however, sufficient to demonstrate some of the broad features of the nutritional situation, the awesome magnitude of the problem, and the urgent need for action.

On the basis of the limited available data, FAO has made a new study of the nutritional situation at the beginning of DD2 and of the changes that occurred during DD1.[31] This study, which is being developed into the Fourth World Food Survey, formed the basis of the assessment of the dimensions and causes of hunger and malnutrition prepared for the WFC.[32]

Nutritional problems were formerly seen mainly in terms of protein deficiency. However, according to the recommendations of the latest in a long series of expert groups convened jointly by FAO and the World Health Organization (WHO) on nutritional requirements, it is now considered unlikely that a dietary intake that is sufficient to cover energy requirements will not also be sufficient to meet protein requirements.[33] Protein deficiency is thus unlikely to occur in the absence of energy deficiency, except where the staple food is starchy roots, plantains or breadfruit, which are very low in protein, or in the case of young children who are unable to consume sufficient of the bulky staple food to meet their protein requirements and thus need foods with a higher concentration of protein. In most developing countries the main need is therefore for the consumption of an increased quantity of food, which will simultaneously correct deficiencies in both energy and protein. Conversely, however, if energy needs are not covered, even if the protein content of the diet is adequate in terms of calculated requirements, some of it will be used mainly as a source of energy and will therefore not be fully available for its protein functions.

Table 2-19 indicates the changes that have occurred in average dietary intakes in the main regions of the world between 1961 and 1969-71 in relation to these latest estimates of nutritional requirements. At the world level, dietary energy supplies were already sufficient in 1961 to meet the total requirements of the population provided they were distributed according to nutritional needs. But it is apparent from the table that these supplies are very unevenly distributed as between the developed and developing countries and between the different developing regions. And, as will be discussed later, there is also considerable maldistribution between developing countries, be-

[31] FAO, *The state of food and agriculture 1974*, Rome, 1975, p. 93-154.

[32] United Nations World Food Conference, *Assessment of the world food situation, present and future*, Rome, 1974, p. 55-73. E/CONF.65/3. This is the basis of the present summary.

[33] FAO/WHO, *Energy and protein requirements: Report of a joint FAO/WHO ad hoc expert committee, Rome, 22 March-2 April 1971*, FAO Nutrition Meetings Report Series No. 52, WHO Technical Report Series No. 522, Rome, 1973.

tween different population groups within these countries, and even within families.

Each of the developing regions made some gains in per caput dietary energy supplies between 1961 and 1969-71. The smallest improvement was in the heavily populated Far East, and the largest in the Near East, which moved from fourth to second place among the five developing regions. But even in 1969-71, Latin America and the Near East were the only two developing regions where average per caput dietary energy supplies were above estimated requirements. Protein intakes are not compared with requirements in the table, in view of the complex relationship now recognized between energy and protein requirements. But it must be remembered that protein is likely to be deficient everywhere that there is an energy deficiency.

In 1961, 74 out of the 96 developing countries for which data are available had a deficit of dietary energy at the national average level in relation to nutritional requirements. By 1969-71 the position had improved to the extent that their number was reduced to 57 (Appendix 2-A). However, even in 1969-71 there were still 24 of these 96 countries (12 of them in Africa) where the deficit was more than 10%.

There is also a substantial maldistribution of food supplies in relation to nutritional requirements within each developing country. It has long been established that this is mainly a function of income. Household budgetary surveys indicate that per caput energy intake, and particularly protein intake, is much higher in the richest income groups than in the poorest. Where data are available for both urban and rural populations, dietary intakes are usually lower in the corresponding income group in the urban areas. In fact the most seriously malnourished people in the world are probably the urban poor, and particularly the newest rural-urban migrants. Far more numerous, however, are the rural malnourished, consisting mainly of the landless and near-landless agricultural labourers and very small farmers.

Food supplies are maldistributed even within families. If there is not enough food for the whole family, the working adults tend to take the largest share. This is particularly serious because children and pregnant and nursing mothers have additional nutritional needs. Comparative studies in different developing countries indicate that in some areas poor children receive only about half of the energy and protein consumed by those in better-off families, and that children's nutrient intakes are not proportional to the nutrient supply available in the household. A particular problem is that children may not be able to eat sufficient of the bulky staple food.

Any attempt to estimate the number of malnourished people in the world cannot therefore be based only on national average food supplies, but must take account of the maldistribution of the available sup-

TABLE 2-19. — AVERAGE DAILY FOOD SUPPLIES PER CAPUT, 1961 AND 1969-71 AVERAGE [1]

Region	Dietary energy				Protein	
	1961	1969-71	1961	1969-71	1961	1969-71
	..... *Kilocalories*		.. *Percent of requirements* ..		..... *Grams*	
DEVELOPED MARKET ECONOMIES [2]	2 950	3 090	115	121	87.5	95.1
North America	3 110	3 320	118	126	92.3	105.2
Western Europe	3 020	3 130	118	123	89.3	93.7
Oceania	3 210	3 260	121	123	92.7	108.1
EASTERN EUROPE AND THE U.S.S.R.	2 990	3 260	116	127	85.8	99.3
Total developed countries	2 960	3 150	116	123	87.0	96.4
DEVELOPING MARKET ECONOMIES [2]	2 130	2 210	93	97	55.0	56.0
Africa	2 120	2 190	91	94	55.7	58.4
Far East	2 050	2 080	92	94	51.3	50.7
Latin America	2 410	2 530	100	105	63.7	65.0
Near East	2 220	2 500	89	102	62.3	69.3
ASIAN CENTRALLY PLANNED ECONOMIES	2 020	2 170	86	92	54.7	60.4
Total developing countries	2 100	2 200	91	95	54.9	57.4
World	2 380	2 480	100	104	65.2	69.0

[1] Food available at the retail level after allowance for storage and marketing losses and waste. — [2] Including countries in other regions not specified.

plies. FAO's latest estimates, using a new methodology based on the very low limit of the maintenance cost of energy,[34] indicate that at least 460 million people suffered from severe protein-energy malnutrition in 1970. These figures exclude China and the other Asian centrally-planned economies, for which comparable data are lacking, but it is likely that there is less maldistribution of the available food supplies in these countries. About 30 million of the severely malnourished are in developed countries, where food consumption surveys indicate that in some countries up to 6% of the population may be at risk of some degree of malnutrition. About 430 million are in the developing market economies, where they represent about a quarter of the total population, and 300 million in the Far East alone (30% of the region's population).

A very large number of the severely malnourished are young children. Clinical and anthropometric data point to a cautious estimate that, of the children under five years of age in the developing countries, 10 million suffer from severe malnutrition, 80 million from moderate malnutrition, and 120 million from less obvious and more difficult to define, milder forms of malnutrition. Thus about half of all the young children in the developing world may be inadequately nourished. Recent studies indicate that in some Latin American countries more than half of the deaths of children under five years of age are directly or indirectly due to nutritional deficiencies.[35]

In addition to the protein-energy malnutrition discussed above, many people still suffer from deficiencies of specific nutrients. Some of these, such as pellagra, beri-beri and scurvy, have been greatly reduced in incidence. But it is estimated that in the Far East alone more than 100 000 children go blind each year as a result of vitamin A deficiency. Iron and folate deficiency anaemias are still widely prevalent in both developed and developing countries, and endemic goitre and associated cretinism still affect substantial numbers of people.

The estimate of at least 460 million severely malnourished people refers to an average year. In times of drought or other calamities the numbers increase substantially. Indeed, the estimate refers to a period before the widespread bad weather and the falls in per caput food production and supplies in many countries that have characterized the first years of DD2. Approaching the mid-point of DD2 it is therefore likely that the numbers of severely malnourished are much greater than at the beginning of the decade. As already mentioned, data on the most recent nutritional situation are very scarce. Death rates have, however, risen sharply in a number of developing countries, and it is highly probable that worsening malnutrition has been a main cause. In India, for example, the crude death rate rose from 16.4 per thousand in 1971 to 18.9 in 1972.[36]

Moreover, there is little prospect of a rapid reduction in the numbers of severely malnourished people. In the absence of substantial redistribution of income and special nutritional programmes, their numbers seem likely to continue to increase. It is estimated that, even if the projected increase in the demand for food in the developing countries can be met by a combination of increased domestic production, commercial imports and food aid, the number of severely malnourished people in these countries would reach 750 million by 1985, or almost two thirds more than in 1970. In 1985 there would still be 34 countries where the national average per caput supply of dietary energy would be below nutritional requirements.[37]

This points clearly to the need for measures to increase food consumption, by means of income redistribution and special nutritional programmes, faster than will happen simply as a result of rising per caput incomes. There are a number of theoretical studies that indicate the potential effect of income redistribution on food consumption, but very few examples of what has actually happened in practice. One of the few such examples refers to Chile during a period of accelerated agrarian reform and large increases in statutory minimum wages. It is estimated that the consequent redistribution of income accounted for about three quarters of the 14% increase in food consumption in 1971.[38]

The action proposals presented to the WFC laid particular stress on special feeding programmes for the vulnerable groups of the population.[39] The WFC resolution on policies and programmes to improve nutrition recommended that governments "initiate new or strengthen existing food and nutrition intervention programmes, on a scale large enough to cover on a continuing basis a substantial part of the vulnerable groups" and "review special feeding programmes within the context of their food and nutrition strategies to determine the desirability and feasibility of undertaking such new programmes, and

[34] For a description of the methodology, see United Nations World Food Conference, *op. cit.*, p. 65-66, 70-73.

[35] Ruth Rice Puffer and Carlo V. Serrano, *Patterns of mortality in childhood: Report of the Inter-American investigation of mortality in childhood.* World Health Organization, Pan American Health Organization, Scientific Publication No. 262, Washington, D.C., 1973, p. 164-166.

[36] India, Office of Registrar-General, Vital Statistics Division, *Sample Registration*, 7 (4), New Delhi, 1974.

[37] United Nations World Food Conference, *op. cit.*, p. 85-86, 95.

[38] Instituto de Capacitación e Investigación en Reforma Agraria, *Diagnóstico de la Reforma Agraria Chilena (Noviembre 1970-Junio 1972)*, Santiago, 1972, p. IV-6 to IV-7.

[39] United Nations World Food Conference, *The world food problem: proposals for national and international action*, Rome, 1974, p. 145-150. E/CONF.65/4.

improving existing ones"; and "that the international agencies, non-governmental agencies and countries which are in a position to provide funds and foods for this purpose, should provide assistance to governments who will request such aid in order to introduce in the period 1975-76, emergency programmes for supplementary feeding of a substantial number of the malnourished children." It recommended that "a global nutrition surveillance system be established by FAO, WHO and UNICEF to monitor the food and nutrition conditions of the disadvantaged groups of the population at risk, and to provide a method of rapid and permanent assessment of all factors which influence food consumption patterns and nutritional status." The WFC also laid considerable stress on the need to integrate food and nutritional plans and policies in their socio-economic and agricultural planning, and called on FAO, in cooperation with other agencies, to prepare a project proposal for assisting governments to develop intersectoral food and nutritional plans.[40]

TABLE 2-20. — ANNUAL CHANGES IN CONSUMER FOOD PRICES IN 84 COUNTRIES, 1969-70 TO 1973-74

Change	1969-70	1970-71	1971-72	1972-73	1973-74
	..... *Number of countries*				
DEVELOPED COUNTRIES					
Percentage increase					
1-5	14	12	5	—	1
5.1-10	9	10	17	9	5
10.1-20	2	3	2	12	14
Over 20	—	—	1	4	5
DEVELOPING COUNTRIES					
Decline	2	7	3	5	—
No change	3	5	2	—	—
Percentage increase					
1-5	28	20	13	5	—
5.1-10	14	17	20	16	5
10.1-20	10	4	16	18	24
Over 20	2	6	5	15	30

SOURCE: Annex table 11.

Consumer food prices

Rapid increases in consumer food prices have been one of the principal results of the poor performance of agricultural production in the first years of DD2. Table 2-20 indicates the general acceleration in these increases from 1971 to 1974.

Particularly during 1973 and 1974, consumer food prices increased faster than the total cost of living in many countries, and were a leading factor in the general inflation. In the developed countries food prices accounted for from 21% (Finland) to 56% (Australia) of the inflation between March 1973 and March 1974.[41] In 1974 consumer prices increased faster than the general cost of living in about three quarters of all the countries for which data are available.

The adverse effects of rising food prices are significant even in developed countries, where the proportion of disposable income spent on food ranges from 16% in the United States to 40% in Ireland, with most countries falling between 20 and 30%. In developing countries for which information is available, this proportion varies from 34% in Malawi to 70% in Indonesia, and in most of them is from 35 to 55%. The proportion is even higher among the poorest groups of the population, and the hardship caused for them by the recent price increases can readily be imagined. Since they are already living at the margin, they have very little scope for switching to cheaper foods in order to maintain their dietary intakes in the face of rising prices.

Many developed countries have recently introduced food subsidies and price control measures in an attempt to protect consumers from rising prices. Many developing countries have also undertaken such measures, but in some cases the fiscal burden has become so great that they have had to be modified or abandoned. In Sri Lanka, for example, major changes in the food supply system were made in October 1973 in order to reduce the subsidy element, although some of the reductions have subsequently been restored.

[40] United Nations, *Report of the World Food Conference, op. cit.*, p. 9-10.

[41] Organisation for Economic Co-operation and Development, *OECD Economic Outlook*, 15, Paris, July 1974, p. 30.

Farm prices, incomes and employment

About 1 657 million people in the developing countries, or 63% of their total population, depended on agricultural production for their livelihood in 1970, in comparison with 70% in 1960. Thus, in turning now to the situation of farm producers in DD2, it must be remembered that in the developing countries they still constitute the majority of the consumers as well. The improvements in the disquieting nutritional situation discussed in the previous section depend to a great extent on increasing the incomes of the poorest groups in the agricultural population.

An important feature of recent years has been an

increasing emphasis on the need to direct a much greater proportion of development programmes and projects specifically at small farmers. The World Bank is now seeking to do this in its investment projects, and the same approach lies behind the agricultural and rural strategy in India's Fifth Plan. Very little information is available, however, on recent changes in the situation of small farmers or indeed of the agricultural population as a whole in the developing countries. The available information on farm prices, farm incomes, and agricultural and rural employment is summarized in the following paragraphs. The rural institutions and services that have so profound an effect on the lives of the agricultural and rural populations are discussed in a later section.

Farm prices

The first years of DD2 have brought very sharp increases in the farm prices both of agricultural products and of inputs. Recent data on prices received and paid by farmers are available for very few countries, especially developing countries. In general, however, the farmer's terms of trade appear to have improved, in many cases substantially, up to the end of 1973. Since then, with the rapid rise in input prices, there has been an equally general deterioration in the terms of trade, but it is probable that in most cases they remain better than at the beginning of the decade.

The rise in agricultural product prices was particularly marked in late 1972 and in 1973. Although input prices, especially for fertilizers, were already rising at this time, the increase in product prices was generally much faster. Thus, in the 12 developed countries for which index numbers of prices received and paid by farmers are available for 1973, the ratio between these index numbers moved in favour of farmers in eight countries (Australia, Belgium, Canada, Finland, France, Japan, Spain and the United States), and deteriorated in only four (Austria, the Federal Republic of Germany, Norway and Switzerland) between 1972 and 1973. In the only developing countries for which such index numbers are available, the ratio improved rapidly in the Republic of Korea from 1970 to 1972 and showed little change in 1973; in the Philippines it improved substantially between 1971/72 and 1972/73.

Since the end of 1973, while the prices of most agricultural products have remained high, those of inputs such as fertilizers, pesticides, machinery and fuel have increased very sharply. The cost of credit has also risen. Unfortunately even fewer data are available for this more recent period. In the United States, however, where the ratio between prices received and paid by farmers (1967 = 100) fell from 119 in November 1973 to 102 in November 1974, it remained slightly higher than at the end of 1972 and considerably higher than at the end of 1970.

Changes in the terms of trade have of course differed for the producers of different agricultural products. Livestock producers, for example, enjoyed particularly favourable conditions in 1972 and the first half of 1973, when livestock product prices (especially for meat) rose sharply. But subsequently they have been squeezed first by rapidly rising feed prices and more recently by falling meat prices as well.

Some indication of the situation in India can be obtained from an examination of wholesale prices for cereals and fertilizers. Between 1971 and October 1974 the wholesale prices of the main cereals rose by from about 200% (wheat) to 450% (rice), while those of the main fertilizers increased by from only 11% (urea and ammonium phosphate) to 45% (triple superphosphate) up to June 1974. However, because of the physical shortage of fertilizer supplies, "black market" prices were undoubtedly much higher. Moreover, in June 1974 Indian fertilizer prices were abruptly raised by an average of 80%. Although the relation between fertilizer and product prices appears to remain profitable, this sudden jump in fertilizer prices, without any corresponding increase in the availability of credit, has caused a reduction in the demand for fertilizers.

The effects of the changes in product and input prices have also differed for large and small farmers in developing countries. It is likely that the larger and medium-sized farmers, who have so far been the spearhead of the green revolution, will have benefited more than smaller farmers from the first phase of rising product prices, because of their higher production. The smaller farmers will also probably have been the hardest hit by the recent sharp increases in input prices, because of their lack of savings and difficult access to credit. It is clear that the most serious effects of the fuel crisis on agriculture will be on the progressive farmers, large and small, in developing countries who are participating in the green revolution and increasing their purchased inputs.

Farm incomes

Recent data on farm incomes are very scarce, especially for developing countries. Data on GDP in agriculture and in the rest of the economy in 1960-62, 1964-66 and 1969-71 are shown in Table 2-21 for 45 countries, of which 28 are developing countries.

Between 1960 and 1970 GDP in agriculture increased at current prices by 8.3% a year in these countries in comparison with an annual increase of 12.7% a

TABLE 2-21. — COMPARISON OF PER CAPUT GDP IN AGRICULTURE AND IN THE REST OF THE ECONOMY IN 45 COUNTRIES AT DIFFERENT LEVELS OF DEVELOPMENT, 1960 TO 1970

Level and country [1]	Rate of growth of GDP 1960-70				Per caput GDP in agriculture as percentage of that in rest of economy					
	Current prices		Constant prices		Current prices			Constant prices		
	Agriculture	Non-agriculture	Agriculture	Non-agriculture	1960-62	1964-66	1969-71	1960-62	1964-66	1969-71
	Percent per year [2]				*Percent*					
LEVEL I	5.5	11.6	...	...	25	22	19	...	...	...
Upper Volta	5.1	10.3	...	...	12	13	10	...	...	...
Niger	5.3	9.9	...	...	10	12	12	...	...	...
Ethiopia	5.2	9.1	...	...	24	21	22	...	...	...
Tanzania	3.7	12.8	...	...	18	13	11	...	...	...
Nigeria	4.2	12.3	...	...	69	57	39	...	...	...
Uganda	9.6	15.2	...	...	20	20	19	...	...	...
LEVEL II	6.7	9.6	3.9	7.1	29	29	30	30	27	27
Ivory Coast	7.4	12.3	...	...	11	12	13	...	...	...
Ghana	7.8	8.3	...	...	59	62	74	...	...	...
Bolivia	4.0	12.7	2.9	7.2	25	20	14	29	26	[3] 23
Kenya	7.2	10.4	...	...	12	13	13	...	...	...
Morocco	6.5	6.3	...	...	26	26	29	...	...	...
Iraq	7.9	6.9	7.7	6.1	22	25	[3] 26	22	24	26
India	10.1	10.1	2.0	4.6	34	37	44	33	30	35
Honduras	3.8	8.2	2.0	7.8	35	30	27	38	30	[3] 27
Iran	5.9	11.4	4.3	10.8	35	34	[3] 29	35	31	[3] 27
Guatemala	...	...	4.4	6.1	...	...	...	21	22	22
LEVEL III	13.1	16.6	3,7	7.3	31	31	30	31	33	30
Thailand	6.8	11.9	5.5	9.4	13	13	13	12	13	14
Philippines [4]	11.6	8.9	5.0	5.2	16	18	[3] 25	16	16	[3] 20
Turkey	8.2	12.3	2.5	7.5	19	21	20	19	20	19
Syrian	...	...	3.9	6.7	...	...	...	31	37	30
Egypt	7.5	6.7	...	...	28	31	34	...	...	...
Korea, Rep. of	22.2	29.5	4.0	12.4	33	41	30	39	41	28
Sri Lanka	4.0	8.8	2.4	5.5	68	54	51	58	56	53
Tunisia	4.1	9.4	...	...	26	25	25	...	...	...
Colombia	14.9	17.5	3.5	5.6	44	45	45	47	46	49
Paraguay	5.9	8.3	2.2	4.9	46	47	43	45	45	40
Brazil [4]	51.5	57.0	...	...	28	28	[3] 26	...	...	...
Mexico	7.2	12.4	3.9	8.1	[5] 16	17	14	[5] 16	16	15
Developing countries (I-III)	9.1	13.0	3.7	7.2	28	27	26	31	29	29
LEVEL IV	8.9	14.0	2.1	7.1	43	45	41	42	41	39
Yugoslavia [6]	15.7	20.3	2.8	8.1	20	24	21	26	24	25
Greece	6.4	11.4	2.9	8.5	29	31	27	29	29	25
Portugal	5.5	10.0	1.2	7.3	41	38	37	41	36	32
Bulgaria [7]	4.9	10.0	...	...	39	51	43	...	...	...
Argentina	24.6	28.2	1.8	4.7	72	87	[3] 77	80	89	85
Spain	7.3	15.1	2.6	8.0	43	36	32	42	35	36
Poland [7]	3.7	8.4	0.6	7.7	38	37	35	37	35	28
Israel	9.7	16.4	...	...	79	67	64	...	...	...
U.S.S.R. [7]	7.0	7.2	...	...	39	50	55	35	34	28
Japan	8.3	16.2	...	...	31	31	28	...	...	...
Italy	5.0	10.4	2.5	5.6	37	40	37	42	47	50
LEVEL V	3.6	8.9	2,3	4,7	69	71	67	60	68	79
France	5.4	10.5	1.8	5.8	37	37	39	38	40	43
Australia	1.9	9.2	...	...	117	119	87	...	...	...
United Kingdom	3.3	6.7	2.3	2.8	103	103	108	94	110	128
Canada	4.6	9.0	2.3	5.7	47	57	54	47	57	61
Sweden	2.5	9.1	...	...	50	47	43	...	...	...
United States	4.0	7.4	2.7	4.5	61	66	73	59	64	72
Developed countries (IV-V)	7.0	12.1	2.1	6.2	56	58	54	49	51	54
Total	8.3	12.7	3.1	6.8	39	39	37	38	40	39

SOURCES: FAO, *World comprehensive demographic estimates and projections, 1950-1985*, Rome, 1972. United Nations, *United Nations yearbook of national accounts statistics, 1972*, New York, 1972. United Nations, Economic Commission for Africa, *National accounts statistics of African countries*, Addis Ababa, 1974. (Mimeo).

[1] Within each level, countries are arranged in ascending degree of development; the degree of development is measured in terms of a composite indicator of 16 economic and social variables, most of which are fairly closely related to GDP per caput; the levels of development represent groups of countries which are homogeneous with regard to the 16 variables (E.F. Szczepanik, *Agricultural policies at different levels of development*, FAO, in press). — [2] Exponential trend. — [3] 1969 only. — [4] Net domestic product. — [5] 1960 only. — [6] Gross material product. — [7] Net material product.

year in non-agricultural GDP. In the developing countries agricultural GDP increased by 9.1% a year and non-agricultural GDP by 13.0% a year, and in the developed countries by 7.0% in agriculture and 12.1% in non-agriculture. At constant prices the gap between the increase in agricultural and non-agricultural GDP is even wider, the respective figures being 3.1 and 6.8% in all the countries for which such data are available in the table, 3.7 and 7.2% in developing countries, and 2.1 and 6.2% in developed countries. There are, however, four countries (Morocco, Iraq, the Philippines and Egypt) where at current prices agricultural GDP rose faster than non-agricultural GDP. In the Philippines the position is reversed at constant prices. In India, although at current prices agricultural and non-agricultural GDP increased at the same rate, at constant prices the increase was considerably faster in the non-agricultural sectors.

Table 2-21 also indicates that per caput GDP is very much lower in agriculture than in the rest of the economy. In the world as a whole the proportion is about 40%, but it is as low as 10 to 12% in certain years in such least-developed countries as Niger, Tanzania and Upper Volta. The only exceptions, with agricultural GDP per caput higher than non-agricultural, are Australia and the United Kingdom.

The gap between agricultural and non-agricultural GDP per caput tends to narrow as the level of development increases, the proportion rising from 19% at level I in 1969-71 to 67% at level V. In the developing countries as a whole it was 26% at current prices and 29% at constant prices in 1969-71, and in the developed countries 54% in both cases. Since the GDP grows more slowly in agriculture than in other activities, this narrowing gap is the result of the slower growth of the labour force (negative in the developed countries) in agriculture than in other activities.

Thus it follows that the proportion of agricultural to non-agricultural GDP per caput would increase over time. This has indeed occurred between 1960-62 and 1969-71 in 20 out of the 42 countries for which data are available at current prices, but another 20 showed the opposite trend and two no change. In the developing countries as a whole the ratio fell from 28 to 26% during this period, and in the developed countries from 56 to 54%.

At constant prices the ratio fell in 13 of the 24 countries for which there are data for 1960-62 to 1969-71. In the developing countries it dropped from 31 to 29%, but in the developed countries there was a rise from 49 to 54%. For the total of 24 countries the ratio at constant prices remained practically unchanged.

Thus there is no evidence of any general narrowing of the gap between agricultural and non-agricultural incomes during the 1960s. Indeed, especially at current prices, the general tendency was for the gap to widen still further. Among the developing countries the income gap widened at current prices in 14 countries and narrowed in only 11. Usually, the movements were small. However, there were large deteriorations in Australia, Bolivia, Nigeria, Sri Lanka and Tanzania, and equally large improvements in Ghana, India, the Philippines, the United States and the U.S.S.R.

Data are not available to measure changes in income distribution within the agricultural sector itself.[42] It appears, however, that the initial phase of the green revolution may have contributed in some areas to a widening of income disparities in agriculture. Since the high-yielding varieties are so far confined to only a few crops and require assured water supplies, income disparities will tend to have widened as between those areas where they can and cannot be used. As regards the impact of the green revolution on the income disparities between small and large farmers, the situation is less clear. Many small farmers have certainly benefited considerably from the green revolution. However, in many areas the large farmers appear to have benefited far more because of the continued bias of credit, extension, marketing and other government services in their favour, and to have strengthened their position still further at the expense of small farmers by evicting tenants and buying up additional land.[43]

Agricultural and rural employment

Agricultural employment is closely linked with the problems of income distribution discussed in the previous subsection. FAO has made a benchmark survey of the agricultural employment situation in developing countries at the beginning of DD2 and the main factors affecting it,[44] but very little information is available to measure the changes that have occurred. There is a good deal of broad statistical information on the past and likely future development of the supply of agricultural labour, but very little on the more complex trends in the demand for agricultural labour.

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[42] While "the poor are disproportionately located in the rural areas and are engaged in agriculture or allied rural occupations," the few data available for developing countries indicate that "in most countries the rural sector is more equal than the urban but the degree of inequality in the rural sector is nevertheless considerable" (Montek S. Ahluwalia. Income inequality: some dimensions of the problem. *In* Hollis Chenery *et al.*, *Redistribution with growth*, London, Oxford University Press, 1974, p. 19-21).

[43] V.K.R.V. Rao, *Growth with justice in Asian agriculture: an exercise in policy formulation*, United Nations Research Institute for Social Development, Geneva, 1974, p. 1-2.

[44] FAO, *The state of food and agriculture 1973*, Rome, 1973, p. 127-174 (reprinted as *Agricultural employment in developing countries*, Agricultural Planning Studies No. 16, Rome, 1973).

The agricultural labour force of the developing countries fell from 73% of their total labour force in 1960 to 66% in 1970 and probably about 62% in 1975 (Table 2-22). In the developed countries the corresponding figures were 28, 21 and 17%. However, whereas in the developed countries this relative decline as a proportion of the total labour force has been accompanied by an absolute decline as well (from 124 million in 1960 to about 88 million in 1975), in the developing countries the agricultural labour force continues to increase in absolute numbers. It rose from 614 million in 1960 to 671 million in 1970 and probably about 700 million in 1975. The rate of increase in the agricultural labour force of the developing countries was about 0.9% a year in the 1960s and is expected to average 0.8% during DD2. This increase in the agricultural labour force of the developing countries is likely to continue for a very long time to come, unless population growth can be considerably slowed down and the expansion of non-agricultural employment speeded up.

The agricultural labour force of the developing countries consists predominantly of small family-farmers. In some countries there is also a large proportion of landless and near-landless labourers. These tend not to be a totally separate social class, but to merge with the small and very small farmers, who themselves depend on part-time work as hired labourers on the larger farms. No statistical information is available on recent changes in the composition of the agricultural labour force, but there appears to be a tendency for a downward movement through the continuum of small farmers, very small farmers, near-landless and landless labourers in many countries. In some countries such as India the problem of landlessness is reported as becoming more acute. In the many countries where there is already heavy population pressure on land resources, the average farm size has tended to decline.

Women are probably more important in the agricultural labour force than in that of any other major sector of the economy, although this is not always apparent from the official statistics of the labour force. This statistical neglect has been one of the causes of the tendency to neglect them in agricultural and rural development programmes and projects. There is virtually no information on the effects of, for example, the gradual spread of education in rural areas, which takes away the elder children from the farm and household, on the ability of rural women to cope with their heavy combined burden of farm and household work and child care. The WFC adopted a specific resolution on women and food, which called on governments "to involve women fully in the decision-

TABLE 2-22. — AGRICULTURAL LABOUR FORCE, 1960 TO 1975, AND PROJECTIONS TO 1980 [1]

Region	Total			Share of total labour force			Average annual increase [2]	
	1960	1970	1975	1960	1970	1975	1960-70	1970-80
	Million			*Percent*			*Percent per year* [3]	
DEVELOPED MARKET ECONOMIES [4]	55.6	43.1	37.0	20	14	11	—2.5	—3.1
North America	5.5	3.9	3.3	7	4	3	—3.2	—3.1
Western Europe	33.2	25.7	22.2	24	17	14	—2.5	—3.1
Oceania	0.6	0.6	0.5	12	9	7	—0.7	—1.4
EASTERN EUROPE AND THE U.S.S.R.	68.1	57.3	51.3	43	32	27	—1.7	—2.6
Total developed countries	123.7	100.4	88.3	28	21	17	—2.1	—2.8
DEVELOPING MARKET ECONOMIES [4]	375.6	421.1	444.9	71	65	61	1.1	1.1
Africa	73.6	83.8	39.4	81	76	73	1.3	1.3
Far East	236.4	265.4	280.2	74	68	64	1.2	1.1
Latin America	33.6	36.6	38.0	48	42	38	0.9	0.7
Near East	30.8	34.1	35.9	69	62	58	1.0	1.0
ASIAN CENTRALLY PLANNED ECONOMIES	238.5	249.5	254.8	75	67	63	0.5	0.3
Total developing countries	614.1	670.6	699.8	73	66	62	0.9	0.8
World	737.8	771.1	788.1	58	51	48	0.4	0.4

SOURCE: FAO, based on International Labour Office, *Labour force projections*, Geneva, 1971. Actual data are generally available up to some years between 1960 and 1965, and estimates for subsequent years are projections based on 1965. The projections are based on the United Nations medium variant for total population, the United Nations macroeconomic projections for DD2, and the IWP.

[1] Population economically active in agriculture. — [2] Minus sign denotes decrease. — [3] Compound interest. — [4] Including countries in other regions not specified.

making machinery for food production and nutrition policies," and "to include in their plan provision for education and training for women on equal basis with men in food production and agricultural technology," [45] The World Population Conference also passed several resolutions stressing the role of women and the need to lighten the work of rural women.

Underemployment remains far more prevalent in the agriculture of the developing countries than open unemployment. A fairly high level of underemployment is inevitable because of the seasonal pattern of production, because of the small size of many farms (resulting both from population pressure on land resources and from inequitable systems of land tenure), and because the agricultural labour force is so much larger than the non-agricultural labour force that is its main market. However, the level of agricultural underemployment in developing countries remains much higher than that which is inevitable. In particular, the agricultural employment situation would be much better if these countries had been able to achieve the accelerated rates of agricultural production increase called for by the DD2 target and their own development plans, instead of becoming increasingly dependent on food imports and thus in effect losing employment opportunities to developed countries. A more rational division of labour in world agricultural production and trade, such as is called for in FAO's proposals for international agricultural adjustment, would increase agricultural employment in the developing countries as well as their export earnings, and would involve a much smaller corresponding reduction in agricultural employment in the developed countries, where in any case the agricultural labour force is already decreasing rapidly.

While there are many estimates of the level of agricultural underemployment in individual developing countries, there are very few indications of whether it has improved or worsened in recent years. An FAO study of Colombia indicates that between 1965 and 1970 the production of 10 main crops increased by 17%, and employment in their production by 10%; since the agricultural labour force rose by less than 8% in this period, underemployment may be presumed to have been slightly reduced.[46]

China has probably been the most successful country in reducing agricultural and rural underemployment in recent years. The commune, the basic unit of rural society, is a unit of labour rather than of land, and as such is responsible for providing employment for its pool of labour in agricultural or non-agricultural activities or in public works. Agricultural and rural underemployment appears to have been considerably reduced, and what remains appears to be much more evenly distributed among the labour force than in most other developing countries.

The agricultural sector was still expected to provide more than half of the new employment opportunities in 10 out of 27 current or recent national development plans that include quantitative targets for agricultural employment. Almost all of these plans expected to be able to keep up with the new entrants to the labour force and to make some inroads into the backlog of unemployment (and often agricultural underemployment as well). Exceptions, however, where it was not expected that it would be possible to keep up with the new entrants to the labour force, include Algeria's plan for 1970-73, India's for 1961-66, Morocco's for 1968-73, Sudan's for 1970/71-1974/75, and Trinidad and Tobago's for 1964-68. In Malaysia agricultural employment targets were not met in 1966-70 because employment on rubber estates declined and there was a shortfall in land development programmes. In Turkey agricultural employment increased by only 213 000 jobs in 1963-67 in comparison with the target of 700 000, since agricultural production did not expand as rapidly as planned.[47]

Although the achievement of a better production performance would have greatly helped agricultural employment in the developing countries, the volume of employment actually generated by a given level and pattern of production depends on the technology used to obtain it. The possibilities for increasing production by extending the cultivated area, which generally increases employment in direct proportion, are becoming much scarcer in most countries. Much therefore depends on the technology used to raise yields, and particularly the extent and type of mechanization involved.

The employment effects of the green revolution technology have been widely studied in this regard. It has generally been found that it increases labour requirements per hectare but reduces them per unit of product, so that total labour requirements rise so long as production increases faster than labour productivity, which appears likely to be possible in most developing countries for some time to come in view of the considerable opportunities for food import substitution. Some case studies indicate a tendency for the green revolution to be accompanied by mechanization and some do not, and this appears to depend mainly on the institutional structure, especially land tenure and the availability of credit and other services for small farmers, in which the new tech-

[45] United Nations, *Report of the World Food Conference*, *op. cit.*, p. 51.

[46] FAO, *Perspective study of agricultural development for South America* (provisional version), Rome, 1972, Vol. I, p. IV-11 to IV-15.

[47] FAO, *The state of food and agriculture 1973*, *op. cit.*, p. 149-150.

nology is introduced. There are many well documented instances where mechanization is not only essential to maximize the cultivated area or to make multiple cropping possible, but also increase employment opportunities in tending and harvesting (as well as handling, storing and processing) larger crops or crops that could not otherwise be planted; however, there are also instances where mechanization has displaced labour.[48]

Most governments now subscribe to the concept of "selective mechanization," based on the avoidance of mechanization that unnecessarily displaces labour. But, partly because of the lack of suitable farm level information, few, if any, have as yet formulated the operational policies of selective mechanization that are required for the specific farming systems and areas in the country. Thus in most countries the pattern of mechanization continues to be somewhat indiscriminate rather than selective. There are even cases where government encouragement of mechanization is stronger than intended, because of such factors as overvalued exchange rates and the reduction of credit repayments by rapid inflation. At the same time the gradual introduction of minimum wages and social security payments in rural areas, combined with mounting social unrest, has made large farmers increasingly reluctant to employ large hired labour forces.

Few countries have as yet taken such policy measures as can be used to alleviate this situation. A number now index mechanization and other government loans to the rate of inflation. Brazil and Uruguay are examples of countries that have devised systems to change the incidence of social security payments so that they do not operate as a tax on employment.

An encouraging feature of recent years has been the increasing tendency to view agricultural employment problems within the wider context of rural employment as a whole and integrated rural development. The widespread underemployment and the seasonal nature of much agricultural employment have led to increased recognition of the need to develop non-agricultural rural employment, and to study its linkages with agricultural employment. A number of countries now place increased emphasis on such factors as rural electrification and the general improvement of rural services and amenities, the development of decentralized rural towns, and participation by rural people in development decisions. But action in these fields is beginning very slowly, and the general lag of the rural areas behind the urban areas continues to accentuate the large income differentials discussed earlier and to stimulate rural-urban migration at a pace much faster than that at which urban jobs can be created. Rural public works are also returning to favour in many countries, perhaps partly under the stimulus of the impressive achievements of China in this regard, although the recent shortage both of food in general and of food aid has enhanced the difficulty of avoiding inflationary effects.

The development plans of many countries propose the use of labour-intensive methods so long as they do not raise costs or conflict with other development objectives. It is clear, therefore, that governments are preoccupied about possible conflicts or trade-offs between employment and production, capital formation and other objectives. Whereas a few years back, with the new emphasis on employment and other social and distributional aspects of development, they were probably ready to accept some trade-offs, they may now be less willing to do so because of the food crisis and the urgent need to increase food production as fast as possible. The trade-offs are usually posed in terms of the loss of production caused by concentrating on employment, and it tends to be forgotten how much employment must have been lost in the long years when production was the only aim. Moreover, it may now be necessary to envisage a situation where the loss of production could be even greater from neglecting employment than from emphasizing it. The social unrest and disorganization that might be caused by a renewed neglect of employment problems could react back and jeopardize the possibility of increasing production fast enough.

[48] International Labour Office, *Mechanization and employment in agriculture: case studies from four continents*, Geneva, 1973.

Production resources

Of the many factors affecting the course of agricultural production, only the weather has been discussed so far. Although the weather caused substantial production fluctuations in 1970-74, the reasons for the longer term lag in production in the developing countries must be sought elsewhere. Some indication can be obtained from an examination of trends in the use of the various main inputs or production resources, objectives for which were proposed in the IWP in relation to the production objectives.

Agricultural investment

Only very rough estimates of the level of agricultural investment are possible. The IWP included estimates of the investment required if its proposed production objectives (and thus the DD2 4% target) were to be achieved. Revised estimates were made for the WFC,[49] which indicate that the annual rate of agricultural investment in the developing countries should be stepped up to $16 000 to 18 000 million in 1975-80 if the necessary acceleration in the expansion of production is to be achieved.

While such figures can only represent broad orders of magnitude, a rough measure of the past inadequacy of agricultural investment is that the current level is estimated at only about $8 000 to 10 000 million, or around half of what is required.

Increasing areas and yields

Some $7 000 to 8 000 million of the total annual agricultural investment required by 1980 would be in land and water development. Of this, about a third would be for the development of new land, and the reminder for the renovation and improvement of existing irrigated areas and equipping new land for irrigation.[50]. The proposals presented to the WFC included the expansion of the arable area in the developing countries from 737 million hectares in 1970 to 890 million hectares in 1985, or by 1.2% a year,[51] which is much faster than the increase of 0.7% a year from 1961-63 to 1985 proposed in the IWP for the countries in the study.

The raising of the objective for arable land amounts partly to a recognition of the failure to increase yields per hectare sufficiently so far. In general the arable area appears already to have increased more rapidly in the developing countries than was proposed in the IWP. From Table 2-7 it was apparent that most of the notable successes in increasing the production of particular commodities in individual countries have come from the extension of area rather than raising yields, the main exceptions being wheat in India and rice in Pakistan. Wheat in fact represents a success story for the developing countries as a whole, in that production increased by 4.0% a year in 1961-74, with higher yields (2.3% a year) contributing more than half the production increase. It is noteworthy, however, that while the increase in production was not far behind the IWP objective of 4.8% a year for 1961-63 to 1975, the expansion of area (1.9% a year) considerably exceeded the 1.2% a year proposed in the IWP. The increase in the rice area (1.1% a year) was slightly above the 0.9% a year proposed in the IWP, but about half of the increase in production came from higher yields (1.0% a year). However, a considerable shortfall in yields is apparent from the fact that production increased by only 2.1% a year in comparison with the IWP objective of 3.3%.[52]

The poor recent performance of agricultural production in the developing countries, and in particular the sluggish rise in yields, have led to much speculation that the green revolution may already have tapered off. Certainly the momentum has slowed down, but it is not possible to evaluate how much of this is due simply to the weather. The impressive results of 1967-70 coincided with a run of generally favourable weather, while the poor results during DD2 must be closely linked with the widespread bad weather in two of the four years that have elapsed so far.

Some slowing down in the momentum of the green revolution was, of course, to be expected. The first jumps in yields are generally the largest and the easiest to achieve. In some countries the speed of diffusion was very rapid, and a large part of the area suitable to the high-yielding varieties (HYVs) of cereals appears to have been already covered. Moreover, further progress now increasingly depends on bringing in more and more of the smaller farmers. The difficulties of reaching these farmers with credit, extension, marketing and other necessary services, and the general bias of these services in favour of the larger farmers, will be discussed in a later section.

An important constraint on the spread of the HYVs of cereals has been the slow expansion of irrigation. Moreover, considerable problems for the green revolution technology have been posed by the recent shortage and high price of fertilizers, pesticides, and fuel. Fertilizers and pesticides are discussed on pages 87-90. A large part of the effect of higher petroleum prices on agriculture in the developing countries comes indirectly through the price of these essential inputs. But many developing countries have also experienced difficulties because of the shortage and high price of fuel for farm machinery and particularly for irrigation pumps. Although the direct and indirect petroleum needs of the agriculture of the developing countries (and indeed of the world as a whole) represent only a small fraction of total consumption, they are crucial for the progressive farmers participating in the green revolution, and require very high priority in any rational allocation of petroleum resources.

[49] United Nations World Food Conference, *The world food problem: proposals for national and international action*, Rome, 1974, p. 131-135. E/CONF. 65/4.
[50] *Ibid.*, p. 67.
[51] *Ibid.*, p. 64.
[52] The figures in this paragraph refer only to the developing market economies, for greater comparability with the country coverage of the IWP.

Irrigation

Better water control has increased in importance since the introduction of the green revolution technology based on the HYVs, which depend heavily on controlled and adequate water supplies. The need for the expansion of irrigation is also thrown into relief by the widespread crop failures of 1972 and 1974, which clearly demonstrated once again the extreme vulnerability of agricultural production to the weather.

Largely on the basis of government plans, the IWP envisaged the expansion of the irrigated area by 1.7% a year from 1961-63 to 1985. Even more important were the allied proposals for a rapid expansion in multiple cropping, whereby the harvested irrigated area would increase by as much as 2.9% a year in the developing countries.

It is not possible to make an over-all quantitative assessment of recent additions to the irrigated area against these proposed objectives. However, especially in the Far East, achievements so far, in respect of both irrigated area and of multiple cropping, appear to have been well below the proposed rates. Indeed, it seems that a much larger proportion of recent production increases than was envisaged by the IWP has come from the extension of the non-irrigated area.

In India the irrigated area rose by only 0.9% a year from 1962 to 1969, in comparison with the IWP objective of 1.7% for 1962-75. Cropping intensity (except on the irrigated area considered separately) showed no increase, while the non-irrigated area continued to increase in contrast to the decrease proposed by the IWP. In West Malaysia there was no increase in the irrigated area between 1962 and 1969, while the IWP proposed an expansion of 1.6% a year in 1962-75. For Sri Lanka the respective figures are 1.3% and 4.0%, and for Thailand 0.8% and 2.2%. On the other hand, in Algeria, Egypt and especially Sudan the irrigated area increased much faster than the IWP objective, while a very large increase is also reported in China.

While in many countries the expansion of the irrigated area has been slower than planned, the increase has also often been partly offset by land that has declined in productivity or even gone completely out of production as a result of poor irrigation practices. Many existing irrigation systems are not effectively used, and these difficulties have been accentuated recently by the shortage of power for pumping already referred to. In fact, in the investment proposals presented to the WFC that were discussed above, about a third of the expenditure for irrigation is on the renovation and improvement of existing facilities, and the proportion is even higher in the Near East. The broad aim is to renovate about half of the existing facilities by 1985.

The WFC recommended a wide range of measures of scientific water management.[53] It also called for "an assessment of the lands that can still be brought into cultivation, taking proper account of forestry for the protection of catchment areas of land required for alternative uses," and for "a World Soil Charter which would be the basis for an international co-operation toward the most rational use of the world's land resources." [54]

Improved seeds

In some of the principal food deficit countries of the Far East HYVs of rice, and especially wheat, were major contributors to the faster expansion of food production in the late 1960s which enabled a few of them to become for a time approximately self-sufficient in certain cereals (e.g. the Philippines in respect of rice in 1968-70). The production objectives proposed in the IWP involved the expansion of the area under HYVs of cereals in the Far East to about 75 million hectares, or almost half the total cereal area of the region, by 1985. The increases proposed for the other regions were generally much smaller.

A comparison of performance with these proposed objectives is difficult, both because of the problems of defining a HYV, and because full data for the most recent years are not yet available. The latest analysis of the progress of the HYVs of wheat and rice [55] indicates that they have continued to increase steadily as a proportion of the total area devoted to these crops in most of the countries using the varieties up to 1972/73, which is usually the last year for which information is available. The main exception is Pakistan, where there was a slight drop in their share of the wheat area and a large one in the case of rice (probably partly due to price policies) in 1972/73. By 1972/73, although the total area under HYVs of wheat was only slightly larger than in the case of rice, these varieties accounted for almost 35% of the wheat area and 20% of the rice area in the developing market economies of Asia. For wheat the highest proportions were in Nepal (66% in 1972/73), Pakistan (57% in 1971/72 and 56% in 1972/73), and India (51% in 1972/73 and 52% in 1973/74), and for rice in the Philippines (56% in 1972/73), Pakistan (50% in 1971/72 and 43% in 1972/73), West Malaysia (40%

[53] United Nations, *Report of the World Food Conference, op. cit.*, p. 10-11.
[54] *Ibid.*, p. 10.
[55] Dana G. Dalrymple, *Development and spread of high-yielding varieties of wheat and rice in the less developed nations*, United States Department of Agriculture. Washington, D.C. July 1974, p. viii-ix, 66-71. Foreign Agricultural Economic Report No. 95.

in 1973/74), the Republic of South Viet-Nam (32% in 1972/73), and India (25% in 1972/73).

Little is known about the actual yields of the HYVs at farm level, although a few examples can be quoted.[56] Between 1966/67 and 1973/74 the yields of the HYVs in India varied from 2.3 to 3.7 times those of the traditional varieties of wheat and from 1.7 to 2.6 times those of rice. In the Philippines in 1968-72 the yields of the HYVs of rice averaged about 1.3 times those of traditional varieties. These comparative figures are, however, affected by the fact that the HYVs are generally planted on the better land.

Some of the problems concerning the more rapid spread of the HYVs have already been mentioned. Pest and disease problems were also widely expected because of their lower resistance than traditional, locally-adapted varieties, their close genetic interrelationships, and the lush growth encouraged by heavy applications of water and fertilizers. So far there appear to have been no major pest and disease outbreaks directly due to the HYVs and, although the danger undoubtedly still exists, it appears to have diminished with the increased crossing of the HYVs with local varieties, and the better resistance of the newer HYVs.[57]

Consumer acceptability still causes problems in some areas. However, a much more important problem is the deterioration of the seed of the HYVs that has occured in many areas as a result of mixing. Moreover, in many countries a major constraint on the introduction of the HYVs has been the absence of an organized industry for the production of quality seed. An FAO survey indicates that of the 25 or so countries using the HYVs of cereals on a large scale, only about a third have adequate seed multiplication and related services.[58] The WFC therefore recommended a number of measures for seed industry development, including the establishment of regional or national seed reserve stocks.[59]

The above discussion of improved seeds has been confined to the HYVs of wheat and rice, which are those that have had the greatest impact in the developing countries so far. There are similar HYVs for maize, millet and sorghum, although their spread has been held up by the lack of facilities for the production of hybrid seed. There are also various types of improved seed and other planting material for many other crops. But there are many important crops for which they are not available, and a priority need, discussed later in connexion with research, is for their development for a much wider range of crops and growing conditions.

[56] Dana G. Dalrymple, *The green revolution: past and prospects* (Draft No. 3), United States Department of Agriculture, Washington, D.C., November 1974, p. 26-30.
[57] *Ibid.*, p. 53-54.
[58] United Nations World Food Conference, *The world food problem*, *op. cit.*, p. 54.
[59] United Nations, *Report of the World Food Conference*, *op. cit.*, p. 12.

Fertilizers

The increased use of chemical fertilizers has been a key element in the higher crop yields that have been achieved in recent years. The success of the HYVs of wheat and rice has been largely because of their responsiveness to fertilizers. The recent shortage and high price of fertilizers has therefore been a serious impediment to agricultural development.

The IWP proposed that fertilizer use in the developing countries should be raised by 14.6% a year from 1961-63 to 1985. The proposed rates of increase ranged from 9.5% in the Near East and northwestern Africa to 22.2% in Latin America. Table 2-23 indicates that in the developing market economies (which correspond roughly to the coverage of the IWP) the actual increase was 13.2% a year in 1961-73 and fell only slightly to 12.1% in 1970-73. Thus, although there was a shortfall from this important objective, it has not so far been very large. Particularly in the Far East, the shortfall is probably partly linked with the slow expansion of irrigation facilities, since much of the increase in fertilizer use was envisaged with HYVs on irrigated land. The slackening in the increase in 1970-73 appears to have been particularly marked in China and the other Asian centrally planned economies.

The preliminary estimates so far available for 1973/74 indicate that the increase in fertilizer consumption in the developing market economies fell to about 1.0 million tons, or 9%, from the 1.5 million ton increase that was to be expected from the long-term rate of 13.2%. This reflects the recent shortage and high price of chemical fertilizers on world markets. However, the shortfall in 1973/74 was much smaller than was feared earlier. In the 1974/75 fertilizer year (July/June) the continued shortage and high prices, which have now more fully worked their way down to the farm level, are likely to have had a greater effect on consumption, although there has recently been some easing of fertilizer prices in international markets and a reduction in demand in the developed market economies.

The initial cause of the shortage and high price of chemical fertilizers was a cyclical trough in production capacity. With the entry of the petroleum companies into the fertilizer industry, some very large plants were constructed, and production ran ahead of demand, so that prices fell sharply from the middle of the 1960s. Not only did this limit the further construction of new capacity, but some of the petroleum companies closed down their new plants and

some older installations were unable to continue at the lower prices. Supplies therefore became tighter and prices began to rise. At the same time there was a new spurt in demand, caused partly by the sharp increase in cereal prices. More recently, fertilizer prices have been affected by rapidly rising capital costs and increased prices of feedstocks. Prices of some nitrogenous and phosphatic fertilizers have risen by 300 to 400% over the relatively low 1970/71 level, and prices for "distress purchases" have been even higher, although there has been some easing in the last few months.

The developing market economies still import almost half of their fertilizer supplies, and many of those with domestic fertilizer industries rely heavily on imported raw materials. The increase in freight rates (which has now eased) also contributed substantially to the higher cost of fertilizer imports. It is estimated that the developing countries would have had to spend an additional $1 200 million in foreign exchange in 1974 in order to import the same quantity of fertilizer as in 1973.[60] Thus, in addition to the physical difficulties of obtaining sufficient supplies, fertilizer imports have caused major balance-of-payments problems for many developing countries.

In order to help meet the problems of the most seriously affected countries, an International Fertilizer Supply Scheme was established by an emergency session of the FAO Council held on 15-19 July 1974. It aims to increase the availability of fertilizers for developing countries, including the establishment of a Fertilizer Pool, and to mobilize financial and technical assistance for the purchase of fertilizers and the improvement of domestic fertilizer production for importing developing countries. Assistance for fertilizer purchases through this scheme also formed an important part of the activities of the United Nations Emergency Operation, established in May 1974. In addition, since fertilizer production capacity is underutilized in most developing countries, because of such factors as raw material and power shortages, equipment failure, obsolescence and poor management, the United Nations Industrial Development Organization (UNIDO), FAO and the World Bank have been cooperating since December 1971 in a programme to increase capacity utilization.

In the longer run, on the assumption that supplies were not a constraint on consumption, the effective demand for fertilizers is expected to grow by about 6% a year up to 1980/81 in the world as a whole, and about 10% in the developing market economies. This would be broadly consistent with a growth in agricultural production in the latter countries of 3.6% a year. The estimates prepared for the WFC indicated that there would still be a substantial gap between

[60] United Nations World Food Conference, *The world food problem*, *op. cit.*, p. 41.

TABLE 2-23. — CONSUMPTION OF CHEMICAL FERTILIZERS, 1961-73 AND 1970-73 AVERAGES [1]

Region	Average annual increase [2] 1961-73	1970/71	1971/72	1972/73	1973/74 [3]	Average annual increase [2] 1970-73
	Percent	..... *Million metric tons*				*Percent*
DEVELOPED MARKET ECONOMIES [4]	5.3	37.9	38.7	40.5	43.2	4.5
North America	7.3	16.4	16.5	17.3	18.6	4.3
Western Europe	5.0	17.4	18.1	18.7	19.4	3.7
Oceania	6.4	1.4	1.4	1.7	2.1	10.7
EASTERN EUROPE AND THE U.S.S.R.	12.5	16.9	18.5	20.0	21.7	8.7
Total developed countries	7.6	54.8	57.2	60.5	65.0	5.9
DEVELOPING MARKET ECONOMIES [4]	13.2	8.8	9.9	11.4	12.4	12.1
Africa	13.4	0.7	0.8	0.9	0.9	8.8
Far East	13.7	4.1	4.7	5.3	5.6	10.9
Latin America	13.0	2.9	3.1	3.6	4.1	12.2
Near East	12.9	1.1	1.3	1.6	1.8	17.8
ASIAN CENTRALLY PLANNED ECONOMIES	15.5	4.7	4.9	5.3	6.2	9.7
Total developing countries	14.1	13.5	14.8	16.7	18.6	11.3
World	8.7	68.2	72.0	77.5	83.6	7.0

[1] N, P, K nutrient content; July/June. — [2] Compound interest. — [3] Preliminary. — [4] Including countries in other regions not specified.

fertilizer supply and the projected demand in 1980/81.[61] It now appears, however, that there should be only small deficits by 1980/81.

The recent shortage and high price of chemical fertilizers have stimulated renewed interest in the potential of organic fertilizers. It is roughly estimated that the total potential availability of organic fertilizers in the developing countries in 1970/71 was equivalent to seven or eight times the nutrient content (in terms of N, P and K) of the chemical fertilizers used in that year.[62] Most of this material is now wasted. While there are many practical and organizational problems involved in expanding its use, effective programmes for this purpose warrant high priority, not only in view of the chemical fertilizer situation, but also for environmental and soil conservation reasons.

In addition to endorsing the shorter term initiatives mentioned above, the WFC made a number of recommendations directed at the longer term problems. It called for assistance on favourable terms for the building of "required additional fertilizer production capacities in appropriate developing countries that possess oil and natural gas, phosphate rock and/or other natural resources such as coal," including the exploration of the possibilities for cooperative ventures. It requested the urgent preparation of "an authoritative analysis of the longer-term fertilizer supply and demand position in order to provide the elements of a world fertilizer policy which would include the over-all aim of avoiding cyclical imbalances between supply and demand, help ensure that fertilizer prices are stabilized at reasonable levels and would enable developing countries to obtain fertilizers they need for their food and agricultural production." It also called for the effective use of "alternative and additional sources of plant nutrients such as organic fertilizers, legume crops and other means of biologically fixing nitrogen and recycling of wastes," and for the voluntary reduction of "non-critical uses of fertilizer." [63] At its Second Session in June 1975 the FAO Commission on Fertilizers made a number of recommendations on the action required to implement the WFC recommendations.

Pesticides

Pesticides are another important element in the package of production resources required not only to increase yields and production, but also in this case to reduce post-harvest losses. It is estimated that something of the order of a third of the potential crop production in developing countries may be lost as a result of pests, diseases and weeds at the production stage and in post-harvest operations.[64] In the recent conditions of food shortage, such losses have assumed even further importance. As with fertilizers, however, pesticides have also been in short supply.

The IWP estimated that an annual increase of 11% in pesticide use would be necessary between 1961-63 and 1985 in the developing countries covered in the study, with the increase ranging from 6% a year in Latin America to 19% in the Far East. More recent estimates prepared for the WFC indicate the need for pesticide use in the developing market economies to rise from about 160 000 tons in 1970/71 to about 800 000 tons by 1985, or at the rate of 17% per year.[65]

It is not possible to estimate the recent rate of growth of pesticide consumption in the developing countries. However, the general impression is that, while the use of herbicides for weed control has increased rapidly in many areas because of a shortage of labour at peak periods, the use of insecticides and fungicides has risen more slowly. There has been some increase in the use of biological agents in place of chemical control.

The slow rise in the use of chemical insecticides is partly due to the banning or restriction of DDT and other persistent organochlorine products. Such environmental constraints have greatly increased the time and the funds needed to develop new production. During 1973/74 the world demand for pesticides increased by about 25%, while production decreased slightly. The demand was met largely by drawing on the current year's production, which would normally have been available for use in 1974/75. Thus it was estimated that in 1974/75 world pesticide supplies would be some 20 to 30% below requirements.[66] Since almost all of the basic feedstocks for pesticide production are produced in the developed countries, a shortfall of this magnitude could, in the absence of special measures, have virtually eliminated the pesticide supply of the developing countries. Pesticide prices have generally doubled in the past two years, and for some of the cheaper types popular in developing countries have tripled or quadrupled.

However, supplies of insecticides have temporarily become easier, as lower cotton prices are discouraging heavy applications on that crop, which accounts for about half of the total use of insecticides. Moreover, the economic recession has increased the availability of basic feedstocks, the shortage of which had caused many pesticide manufacturing plants to operate far below capacity. Since increased capacity for pro-

[61] *Ibid.*, p. 35-40.
[62] *Ibid.*, p. 46.
[63] United Nations, *Report of the World Food Conference*, *op. cit.*, p. 6-7.
[64] United Nations World Food Conference, *The world food problem*, *op. cit.*, p. 49.
[65] *Ibid.*, p. 49.
[66] *Ibid.*, p. 50.

ducing the basic foodstocks will not be available until 1977, however, any major economic upturn could again affect pesticide production, and shortages remain a continuing threat until then.

The WFC recommended "that international coordination be established to facilitate the supply for the developing countries or their common control organizations with a maximum assurance under favourable economic conditions of necessary pesticides and equipment and advice on their efficient and safe use, including wherever possible the encouragement of local manufacture and the establishment of adequate revolving reserve stocks to cater for any emergencies." [67] Subsequently, the FAO Council urged governments and industry to give priority to developing centres during the period of shortage, and an information-gathering programme has been established in FAO. The *Ad Hoc* Government Consultation on Pesticides in Agriculture and Public Health was held in April 1975 in order to develop the necessary action to follow up the WFC recommendations.

Farm machinery

The production objectives of the IWP were associated with a rapid increase in the availability of farm power. It was proposed that tractor numbers, which can be taken as a rough over-all indicator of the level of mechanization, should be increased by 8.4% a year in 1965-75 in the developing countries covered in the study. The regional objectives ranged from 3.1% a year in northwestern Africa to 12.5% for four-wheel tractors and 19.1% for two-wheel tractors in the Far East.

The actual rate of increase in the countries studied was 5.9% a year in 1965-74, or somewhat below the proposed objective. However, the objectives were substantially exceeded in Latin America, the Near East, and northwestern Africa. They were approximately met in Africa south of the Sahara and in respect of two-wheel tractors in the Far East. The only substantial shortfall was in the case of four-wheel tractors in the Far East (6.7% a year instead of 12.5%). The overfulfilment of the objectives in several regions cannot be viewed with equanimity, because of the possible effects of mechanization on employment discussed earlier. The IWP objective took account of the need to create as much employment as possible without sacrificing production objectives, and the rapid increases in mechanization that have occurred may in some cases have led to unnecessary displacement of labour.

In the Far East the shortfall from the very high rate of expansion proposed for four-wheel tractors may have caused difficulties. There is evidence that machinery for the rapid handling, drying, storage and processing of cereal crops is insufficient in many areas of multiple cropping, although the situation as regards machinery for rapid land preparation is less clear.

The preliminary data available for 1974 indicate that tractor numbers in the developing countries rose by only 4.3%, or considerably less than the longer term growth rate. This is likely to reflect the recent increase in machinery prices and, even more so, the substantial rise in operating costs caused by the raising of petroleum prices.

Resources for livestock production

Little statistical information is available on production resources for the livestock subsector, where, as indicated earlier, the production performance in the developing countries has generally been closer to the IWP objectives than in the case of crop production. Many of the necessary production resources concern the feed base, so that livestock development must have suffered from the inadequacies in crop production already discussed. In particular, there is no sign yet of the emergence, except on a sporadic basis, of the additional cereal supplies surplus to human consumption that were the basis of the higher growth rates for pigs and poultry proposed in the IWP world study. Little progress has been made in using agro-industrial by-products, particularly in ruminant rations so as to release more cereals for pig and poultry feed.

The increase in livestock production in the developing countries has come much more from larger herds and increased slaughterings than from higher productivity per animal. In 1970-72 the developing countries were on average producing 14 kg of beef and veal per animal, in comparison with 75 kg in the developed countries. Progress in animal health has generally been faster than in breeding, feeding and management, although the main progress has been confined to a few of the major epizootic diseases. Little has been done to strengthen animal health services, especially in improving vaccine production, diagnostic facilities, and field programmes for the prevention and control of infectious and parasitic diseases. The infant mortality for calves and lambs remains as high as 50% in many cases. Many countries are inhibited from developing meat exports because their production areas cannot yet be designated as disease-free.

The main recommendation of the WFC concerning livestock production was for the launching of a long-

[67] United Nations, *Report of the World Food Conference, op. cit.*, p. 11-12.

term programme for the control of African animal trypanosomiasis.[68] It is estimated that such a programme would make it possible for the tropical zone of Africa to carry an additional cattle population of 120 million head, which could produce 1.5 million tons of meat per year.[69]

[68] *Ibid.*, p. 12.

[69] United Nations World Food Conference, *The world food problem, op. cit.*, p. 72.

Rural institutions and services

In attempting to review and appraise progress in the world's food and agricultural sector during DD2, the most difficult area of all is the particularly vital one of rural institutions and services. There are no global statistics to give even a rough over-all idea of what has occurred. The only concrete evidence concerns very specific cases in individual countries, which do not provide a sufficient basis for a world review and appraisal. Most of the present section must therefore be based far more on broad qualitative impressions than the rest of this chapter. However, there are a number of recent studies of the main rural institutions and services that lend some authority to the general impressions summarized below.

The functions of rural institutions and services are far-reaching. At the simple level, they constitute the delivery system to farmers of the production resources discussed above, and as such their inadequate development must bear part of the responsibility for the general failure to meet production objectives in developing countries. But they are responsible for providing farmers not only with the physical means but also with the incentive to increase the use of production resources, including their own labour, and expand their production. Even more important, they largely determine the access of rural people to income-earning resources and opportunities, and thus the distribution of the benefits of increased production, and the extent to which these people can participate in society, in the development decisions that concern them and in the fruits of development.

Apart from the social goals involved, it has increasingly been realized in recent years that only an approach based on the widespread participation of the rural masses can ensure the rapid, sustained expansion of agricultural production that is required in the developing countries. Self-reliance and popular participation are beginning to be seen as basic inputs for development when blended properly with technological improvements. The focus has gradually been widened from a simple emphasis on agricultural production to the all-embracing sphere of integrated rural development. A particularly important aspect of this new approach has been the realization that, if the vast mass of poor people are both to be benefited by and to contribute to the necessary increase in production, development programmes and projects have to be directed much more specifically to them. Hence the new emphasis on small farmers, who constitute such a large part of the poorest people in developing countries.

In this regard the WFC recommended that the international agencies should give "priority to programmes and projects aimed at benefiting the poorest groups of the population and placing equal emphasis on both economic and social benefits." [70]

But in spite of this marked change in development approaches, little has yet been achieved in practice. This results partly from the long time usually required to implement changes of this kind, but also from the difficulties stemming from the existing rural structures in most developing countries. A few countries like Japan, now of course a developed country, and the Republic of Korea have long had a "unimodal" agricultural structure, with fairly uniform small-sized farms. In these circumstances there have been no particular difficulties in devising and implementing government policies that fully involve the small farmer. But in most developing countries the agricultural structure remains highly "bimodal" or "dualistic," with a small commercial subsector of large farmers existing side by side with a large subsector of small farmers producing mainly for their own subsistence by traditional means. In these circumstances (given the shortage of trained manpower for government services, the difficulties of reaching large numbers of scattered small farmers, and the political power of the large farmers), credit, extension, marketing and other essential services to farmers have tended to be directed mainly to the larger farmers. Even where the need to reach the smaller farmers has been fully realized, there is still generally a lack of appreciation of the innovative approaches needed to achieve this.

The range of rural institutions and services is very wide. At the highest level there are the various services for planning the agricultural and rural sectors.

[70] United Nations, *Report of the World Food Conference, op. cit.*, p. 5.

In recent years more and more countries have established agricultural planning units, within the agricultural ministry, to work with the central planning unit. Many recent national development plans devote an increased proportion of development expenditure to the agricultural sector. There is as yet little provision, however, for planning in the wider context of integrated rural development. Projects still tend to be appraised very largely in economic terms. In many countries responsibility not only for the rural but also for the agricultural sector is split among a number of separate departments.

At the other extreme there are many highly specialized institutions and services, some of them already briefly mentioned, in such fields as plant protection, seed development, animal health, fisheries and forestry. The following discussion is limited to those institutions and services that have the broadest impact — land tenure; credit; marketing and related activities; education, training and extension; and finally research.

Land tenure

The need for agrarian reform in many countries and the complexity of the processes it involves have been increasingly recognized in recent years. Important examples of the trend of thinking are the declaration on agrarian reform of the Eleventh FAO Regional Conference for Latin America, adopted in October 1970,[71] and the report of the Special Committee appointed by FAO, jointly with the United Nations and the International Labour Organisation (ILO), to review the progress of agrarian reform in DD1 and make recommendations for DD2.[72]

The Committee concluded that the objectives of DD2 could not be achieved without expediting agrarian reform. "Unlike the concept underlying most of the reforms implemented in an earlier period, it is now considered that straightforward changes in land tenure are not sufficient and do not by themselves constitute an objective ... such changes must be accompanied or rapidly followed by others of an institutional nature ... reform now has the two-fold aim of serving as an instrument for equitable redistribution of resources and as a vehicle for increasing productivity and bringing about the desired improvement." It laid particular stress on the establishment of cooperative production organization by the reform beneficiaries. The detailed strategy for DD2 proposed by the Committee was approved by the Sixteenth Session of the FAO Conference in November 1971 and by ECOSOC.[73]

The Sixth Report to Ecosoc on Progress in Land Reform,[74] prepared jointly by FAO, the United Nations and ILO, is intended by Ecosoc as a contribution to the mid-term review and appraisal of DD2. It agrees broadly with the conclusions of the Fifth Report [75] and of the Special Committee that during DD1 the extent and rate of changes in areas with obsolete agrarian structures were less notable than in the two previous decades. Many of the reform measures of the 1960s were limited in scope, and were not intended to help the majority of the rural population. Most of them resulted in insignificant changes in the existing agrarian structures, and no effort was made through them to integrate the rural masses in the development process. In the absence of effective structural changes, many countries have instead adopted the strategy of resettlement in new areas, but this has not yet contributed much to the solution of major rural problems.

Most of the changes that have occurred in agrarian structures have mainly resulted from actions dictated by the objective of economic growth. The need to increase production has led to intensification and specialization on large-scale modern enterprises, including the growth of multinational farming corporations. Such changes have tended to reinforce the leading position of large private entrepreneurs, managers and government policy makers at the expense of the labour force working on the land. The absence of the necessary political will, and the unwillingness of the privileged groups to accept sacrifices, have been major obstacles to effective agrarian reform. Some programmes have been sidetracked by administrative and political interference, in the absence of strong farmers' organizations. There has sometimes been administrative interference with these organizations on the grounds that the farmers could not run them themselves.

More recently, even though the situation remains on the whole discouraging, new trends in agrarian reform programmes in some countries are showing promising possibilities. In some Latin American countries, an integrated approach has been adopted in the expropriation, redistribution and allocation of land, supported by the organization of associative tenure and production structures. These usually involve communal control of land use (even where individual ownership remains), and entrepreneurial control of production and related activities by the bene-

[71] FAO, *Report of the* Eleventh *FAO Regional Conference for Latin America, Caracas, 12-20 October 1970*, Rome, p. 40-46.
[72] FAO, *Report of the Special Committee on Agrarian Reform*, Rome, 1971.
[73] *ECOSOC Resolution 1707 (LIII) on Agrarian Reform.*
[74] United Nations, *Progress in land reform: Sixth report* (in press).
[75] United Nations, *Progress in land reform: Fifth report*, New York, 1970. E.70IV.5.

ficiaries. Many new farmers' organizations have been established, and their organizational, motivational and training activities have substantially contributed to the emergence of what is now a strong *campesino* leadership in a number of countries.

Recent developments in Africa and Asia have been less significant in terms of institutional innovations. The traditional agrarian structures have been maintained in most African countries, but a few governments have initiated development programmes involving the rural people themselves and the building up of their own organizations. In Asia too, rural development programmes have generally been carried out without effective fundamental structural changes. Numerous legislative measures have been enacted for the reform of land tenure systems, but the actual accomplishments have been very small.

The WFC called on governments "to bring about appropriate progressive agrarian reforms in accordance with the political objectives and administrative capabilities of each country, adequate means of information and motivation and other institutional improvements in rural areas aimed at employment and income generation, at organizing, activating and assisting the rural population, including nomads, for participation in integrated rural development and at eliminating exploitative patterns of land tenure, credit and marketing systems where they still prevail." It also invited governments to "promote the development of cooperative organizations and other associations for the mass of farmers and rural workers." [76]

Credit

The increased use of the purchased inputs required for technological progress depends heavily on improved supplies of credit. The IWP proposes some approximate objectives for the expansion of credit. Requirements of operations credit were estimated to rise by 117% between 1962 and 1975, and by a further 69% between 1975 and 1985. For the much larger category of medium- and long-term development credit, the annual needs in 1975-85 were estimated as 50% greater than in 1962-75.

Although there have been substantial increases in the supply of agricultural credit in recent years, it is not possible to assess them against these objectives. Even data on institutional credit are far from complete, and very little is known about the amount of credit derived from non-institutional sources. It is estimated that only about 5% of farmers receive institutional credit in Africa and about 15% in Asia and Latin America.[77] Moreover, in most countries only a tiny fraction of the institutional credit goes to the small farmers. While most large farmers can obtain credit from a variety of alternative sources, small farmers can either obtain no credit at all or have to depend on local moneylenders because credit institutions find the administration and supervision of small loans unattractively costly. Frequently the result is chronic indebtedness for the small farmer.

Very few developing countries have as yet succeeded in establishing effective credit institutions for dealing with the large numbers of small farmers who must be drawn in as active participants in the production effort. The main successes have been where the farmer has only a single office to go to for his seeds and fertilizers, for credit, for technical advice and for the disposal of his produce, but this situation is still rare. Still fewer countries have been able to move on to the next stage of mobilizing agricultural savings for relending. Moreover, agricultural taxation remains rudimentary in most developing countries. In India and Pakistan, for example, agricultural incomes (as opposed to agricultural land) are exempt from taxation, so that the substantial profits made by large farmers out of the green revolution have gone untaxed.

The recent performance of agricultural credit institutions was reviewed in a series of FAO regional seminars, in preparation for a World Agricultural Credit Conference held in 1975. In the Near East institutional agricultural credit is still a recent concept, and in many countries agricultural credit banks have been established only in the last 10 or 15 years (in Saudi Arabia as recently as 1965, for instance). Although institutional credit has doubled or even trebled in the last decade, its share in total agricultural credit remains very small (6% in Iran in 1971/72, for example). A considerable number of small farmers, nomads and fishermen in several countries of the Near East still cannot obtain credit from public institutions for such reasons as low income and repayment capacity, the high risk involved, and the physical difficulty of reaching them in scattered locations and remote villages.[78]

In Africa the main weaknesses of agricultural credit institutions are that agricultural credit has been provided in isolation from other agricultural support services; the lack of an appropriate credit agency in some countries; the operational weakness of such institutions in some others; unevenness and inadequacies in the services offered, especially to small farmers; shortage of trained personnel and qualified

[76] United Nations, *Report of the World Food Conference, op. cit.*, p. 6.

[77] United Nations World Food Conference, *op. cit.*, p. 57.

[78] Agricultural credit: institutions and performance, with particular reference to the Near East. *Monthly Bulletin of Agricultural Economics and Statistics* (*FAO*), 22(12), 1973, p. 1-12.

management; and vulnerability to political interference.[79]

Marketing and related services

According to United Nations estimates, the urban population rose from 22% of the total population of the developing countries in 1960 to 26% in 1970, increasing at an average rate of 4.6% a year.[80] Mainly because of this rapid urbanization, the IWP production objectives imply an increase of as much as 5 to 6% a year in marketed agricultural production. The IWP estimated that investment requirements for new marketing facilities, including storage and processing but excluding transport and retail outlets, were of the order of $30 000 million from 1961-63 to 1985, or about a quarter of the estimated investment required for increased production.

Even in areas where communications are good and producers not physically isolated, it has generally been found difficult to integrate small farmers into the marketing system. Attempts to organize the collection and primary marketing of produce through farmers' cooperatives have succeeded in some cases, but there have been numerous failures. Some countries have established statutory boards or public buying agencies to deal directly with farmers, but they have often proved too costly and ill-adapted to collecting produce from widely scattered small farmers. There have been similar difficulties in the distribution of fertilizers and other inputs, again especially in the case of small farmers.

Marketing policy still frequently suffers from over-preoccupation with the forms of organization, to the neglect of management efficiency, risk-bearing, innovation and incentives. Government intervention has often been sporadic and misguided.

Food price policies have often in the past tended to favour the urban consumer at the expense of the incentives needed to increase production fast enough at farm level. In recent years there has been some reversal of these policies, and higher farm prices were a major factor in increasing incentives in the many countries (especially in the Far East) where there was an acceleration in the expansion of production in the late 1960s. More recently, both farm product prices and input prices have risen very rapidly as a result of the general shortages. These changes have enhanced the importance of careful adjustments to price policies in order to maintain production incentives. Such adjustments will be particularly necessary in the developed countries if a rapid expansion of production is to be maintained for the rebuilding of stocks.

In many countries the whole marketing chain from producer to consumer has become badly overstretched as a result of the very rapid pace of urbanization. Facilities for storage, processing and wholesale marketing have not been adequately developed, and still involve substantial avoidable losses of food. It is estimated that post-harvest losses of cereals are generally 5 to 10% (20 to 40% in exceptional cases) and of perishable fruits and vegetables 30-40% in developing countries.[81] There are also substantial losses in the nutritional quality of food during storage. The need to establish national security stocks on a

[79] Credit institutions and their impact on agricultural development in Africa. *Idem*, 23 (10/11), 1974, p. 7-15.
[80] United Nations, *Monthly Bulletin of Statistics*, 25(11), 1971, p. xxxvi.
[81] United Nations World Food Conference, *op. cit.*, p. 99.

TABLE 2-24. — MAJOR AGRO-INDUSTRIES IN THE DEVELOPING MARKET ECONOMIES

Agro-industry	Value added						Employment			
	Share of total manufacturing			Value	Average annual increase		Share of total manufacturing		Number	Average annual increase
	1960	1970	1972	1972	1960-70	1970-72	1960	1970	1970	1960-70
	..... *Percent*			*Thousand million U.S. dollars*	..... *Percent*				*Million*	*Percent*
Food, beverages, tobacco	29	24	23	13.3	4.5	5.6	20	19	10.4	2.7
Textiles	15	12	12	7.0	4.0	7.7	26	21	11.7	1.1
Wood products, furniture	4	4	4	2.1	6.1	6.4	10	11	6.0	4.4
Total	48	40	39	22.4	4.5	6.4	56	51	28.1	2.3

SOURCE: United Nations Industrial Development Organization. *Industrial development survey: Special issue for the Second General Conference of UNIDO*, New York, 1974, p. 226-227. ID/CONF.3/2 (ID/134).
NOTE: The table covers Isic categories 31, 321 and 33. Category 33 includes furniture that is not agro-based. Because of the lack of disaggregated data, the table excludes leather, paper and rubber products.

much larger scale than before has also enhanced the importance of improved storage.

The establishment of agricultural processing industries not only helps to reduce post-harvest losses, but also increases value added, provides important employment opportunities (to a great extent in rural areas), stimulates agricultural production, and is the basis of the early stages of industrialization. In the least developed countries the share of agro-based industries (food, textiles, wood, leather and rubber) in the total value added in manufacturing industry varies from 54% in Uganda to 99% in Somalia, and in employment in manufacturing industry from 56% in Dahomey to 99% in Somalia.[82]

Table 2-24 shows recent trends in the major agro-industries in the developing market economies. The total value of production of the three major groups rose by 4.5% a year in 1960-70 and 6.4% a year in 1970-72 to reach $22 400 million in 1972. Employment in these industries rose by 2.3% a year in 1960-70, to reach a total of 28.1 million persons in 1970. Their share of the total value added in manufacturing industry, although gradually declining, was still 39% in 1972, and in manufacturing employment 51% in 1970. The addition of leather, paper and rubber products, for which disaggregated data are not available, would raise the approximate share of all agro-industries in 1970 to 46% of value added and 59% of employment in manufacturing in the developing market economies. Food industries remain by far the largest category of agro-industry in terms of value added (23% in 1972), but textiles account for the major share of employment (21% in 1970).

Education, training and extension

The IWP included estimates of the increases in trained manpower required for government services to farmers adequate to support the proposed production objectives. Subsequently a World Conference on Agricultural Education and Training was held,[83] and a special study prepared which included a review of progress during DD1 and proposals for DD2.[84]

There was a very rapid expansion during DD1 in the number of higher agricultural educational institutions in the developing countries. In Latin America they increased from 15 in 1964 to 151 in 1969. In Asia the increase in the number of institutions was over 150% between 1957 and 1968, and in the number of graduates 250%. Especially in Asia, many of the newer institutions are comprehensive agricultural universities. In 13 Asian countries, 10% of the university-level institutions offering agricultural education are agricultural universities accounting for a quarter of all students studying agriculture.[85] In spite of the rapid expansion in the number of institutions and graduates, however, the shortage of trained manpower continues to be serious in many countries.

The expansion of higher education has not been matched at the intermediate level of agricultural education and training, which is so important for the staffing of extension and other field-level services. The educational and training pyramid has therefore frequently become inverted, overweighted by the number turned out at higher levels, with little regard to lower levels of training. There has been a general absence of adequate planning of educational facilities in relation to the requirements for trained manpower. Partly this has resulted from the frequent division of responsibility for educational planning and development between ministries of agriculture, which are usually involved at the intermediate and vocational levels, and ministries of education, which are responsible for the higher levels. The need for national coordinating councils for agricultural education and training has been widely recognized, but few have yet been established.

In many cases agricultural education has suffered from the use of models transplanted from other countries where they have been evolved to meet different conditions, and from a lack of the flexibility required to meet changing needs. The isolation of higher education from direct involvement with the life of the rural community has been another cause of its limited effectiveness. There is often an unpractical orientation in the training, and the graduates are seldom used at the farm level where they are most needed.

Intermediate-level education has suffered from uncertainty and constant change. It is often seen as a pale imitation of university faculties of agriculture, and is thus remote from the practical needs of agricultural and rural development. It is almost always based on two- or three-year institutional courses, and there have been few experiments with less formal approaches, including short recurrent courses that ensure that the trainees do not become divorced from the farm level.

In the crucial field of agricultural extension and training, a new study was prepared for the Third Session of the FAO Committee on Agriculture in April

[82] United Nations Industrial Development Organization, *Industrial development survey: Special issue for the Second General Conference of UNIDO*, New York, 1974, p. 269. ID/CONF.3/2 (ID/134).

[83] FAO/Unesco/ILO, *Report of the World Conference on Agricultural Education and Training, Copenhagen, Denmark, 28 July-8 August 1970*, Rome, 1971.

[84] FAO, *The state of food and agriculture 1972*, Rome, 1972, p. 125-140.

[85] *Ibid.*, p. 125-126.

1975.[86] It starts from the premise that "orthodox extension systems with small numbers of highly trained staff have not been successful in developing countries with their numerous scattered small farms and poorly developed transport networks." [87]

While it is now generally accepted that extension work must have the broad aim of improving rural levels of living, it is still seen in many countries purely as an instrument to boost production. It is rarely recognized that the introduction of a new variety of a staple crop, for example, will substantially alter not only well-established patterns of husbandry, but also social, economic and dietary habits.

The number of farm families per extension worker is no longer regarded as a reliable guide to effectiveness, but it at least illustrates the wide range: for example, in India and Zambia over 800, in Brazil about 5 500 and in Bolivia over 8 000. Actual contact rates are even lower. A recent survey indicates that they amount to only about 2.5% of all farms in Paraguay and no more than 10 000 out of 300 000 farm units in Ecuador.[88] Some of the most successful programmes in extension and training, such as the Gezira in Sudan, Comilla in Bangladesh and Monkara in Chad, have been conducted on a comparatively small and controlled scale, with massive investment often to the neglect of other parts of the country.

Extension services are frequently regarded as fixed and rigid systems, instead of the flexible and even unconventional services that are needed to produce innovation and change and to adjust to changing situations. Planning and decision-making have been highly centralized. The links between the extension service and all the other essential inputs, not only into the total rural learning system but also into the total rural development effort, are often marginal. In some countries the various services to the farm family are run by a number of different ministries, with scant cooperation between them.

Both in extension and training there has been a very marked bias toward the larger and more advantaged farmers. Sometimes this has been deliberate, because of the belief that it may be quicker and easier to get increased production in this way, but often it has been mainly a result of the institutional system, and of the natural desire of extension officers to be able to show tangible results. Most extension services have also catered exclusively to the adult male population. In spite of the fact that in many countries the women do a large part of the agricultural work and take many of the important decisions, women's programmes have tended to be concentrated on home economics, to the exclusion of agriculture. Although many extension services have a rural youth component, this is generally weak. There has been a general failure to examine the leadership pattern and the client groups in society before embarking on the introduction of innovations. Little use has been made of the extension services as a channel for the communication of the needs of farm families.

It is rare for extension to offer a career that is attractive to qualified people, and salaries are often very low. The preoccupation with increasing production has led to training which concentrates on technical subjects, often to the virtual exclusion of economic and social subjects. There is little teaching in modern communications techniques, including audio-visual aids, or in simple administrative matters. Little is being done to provide in-service training to keep extension agents abreast of technological and other changes.

A basic need is for the creation of various forms of associations, groups and organizations of producers. In addition to their importance for peoples' participation, already discussed, they facilitate self-help and the emergence of a local leadership structure, and make it possible for extension agents to work through meetings with the group, and less through limited face-to-face contact. Other non-formal education services for all sectors of the rural community can be established in this way, and radio and television clubs can be formed so that the modern communications media can work hand in hand with the local change agents. So far, however, there is little experience either in setting up suitable farmers' organizations or in using them in these ways.

The problems of agricultural and rural education begin at the level of the rural primary school. The present systems lead the more successful into an increasingly urban-biased secondary and higher education system, while the less successful majority are left very ill-equipped for the agricultural work in which they will have to spend their lives, and with a tendency to despise it. It is therefore necessary to re-examine the whole rural learning system. A further defect of agricultural education, training and extension in most countries is the lack of adequate relationships with research.

The WFC recommended "that priority be given to, and increased resources made available for the development of agricultural education and training at all levels, in order that the required training programmes can be provided including training of research and extension workers in management techniques, special basic and in-service technical training for graduate

[86] FAO, *Agricultural extension and training*, Rome, February 1975. COAG/75/5.
[87] FAO, *Report of the Second Session of the Committee on Agriculture*, Rome, 1974. CL63/5.
[88] J. Herzberg and S. Antuña, *Analytical study of the extension services for Ecuador and Paraguay*, FAO, Rome, 1973.

and middle-level extension personnel, and farmers' training, including programmes for rural women and children aiming at the achievement of an integrated educational system for the rural population within an appropriate political and social framework." [89]

Research

Agricultural research is one of the few major areas where encouraging progress has been achieved in the first years of DD2, even though it remains inadequate in relation to requirements. The recent progress of agricultural research has been appraised in an FAO study,[90] and in the proposals presented to the WFC.[91]

Particularly because of the spectacular results of the green revolution technology in a number of developing countries, there has been increased awareness of the potential contribution of research to development. The need has been increasingly recognized to regard research and research support activities as part of a chain, of which training is an essential link to increase national capacities for research, and with application as its end point.

Until the mid-1960s the application of modern agricultural technology in the developing countries was principally confined to export and industrial crops such as cocoa, tea, rubber and oil palm. An outstanding result of applied research during this period was, however, the control of the desert locust. Research on food crops and livestock (particularly ruminants) did not have corresponding success. Progress was made in animal disease control, but it was disappointingly slow in other areas of livestock production. Until recently a somewhat similar situation existed for major staple food crops, partly because of the belief that what was mainly needed was the better use of existing knowledge through extension programmes.

Subsequently there has been the historic breakthrough in the production of wheat and rice in developing countries that is generally known as the green revolution. This was based on the development through genetic engineering of new varieties highly responsive to irrigation and fertilizers, and the provision of these varieties to farmers as part of an appropriate package of inputs and cultivation practices based on experiments in farmers' fields. Important lessons have been learned and plant engineering techniques developed that can result in more rapid progress with other cereals and, it is hoped, food legumes, vegetables, and roots and tubers.

Information on agricultural research expenditure in or on behalf of the developing countries is hard to obtain, but in 1970 the total was probably around $360 million, including about $125 million of external assistance. The proposals presented to the WFC involve an increase at 1970 prices to an annual level of $1 250 million in 1985, of which $350 million would represent external assistance.[92]

Most of the external assistance for agricultural research in developing countries is provided bilaterally, but an important recent development has been a rapid increase in the amounts channelled through international, multilateral programmes. Rice breeding research in the Philippines was organized on an international basis in the International Rice Research Institute (IRRI) in 1962, and wheat and maize research in Mexico in the International Maize and Wheat Improvement Centre (CIMMYT) in 1968. Since then six further international centres have been established, dealing with sorghum, millet, pulses, cassava, potatoes, sweet potatoes, beef production (Africa and Latin America), animal diseases, and pig production. Farming systems for the low humid tropics (Africa and Latin America), for semiarid regions and for the rice-growing areas of Asia are being intensively studied at these centres. All of them follow a problem-oriented multidisciplinary approach. In addition to "core" research and training programmes, they have many close ties and cooperative links ("outreach programmes") with national research programmes.[93]

In order to give stronger support to these centres and to national agricultural research in developing countries, the Consultative Group on International Agricultural Research (CGIAR) was established in 1971 under the co-sponsorship of FAO, the World Bank and the United Nations Development Programme (UNDP). As well as supporting the international centres, it also finances the recently created International Plant Genetic Resources Board. The International Information System for the Agricultural Sciences and Technology (AGRIS) has been established under the auspices of FAO, and the Current Agricultural Research Information System (CARIS) is being established by FAO with assistance from members of the Consultative Group and with links to systems in developed countries.

The WFC made a very wide range of recommendations on agricultural research, including a substantial enlargement of the resources of the Group.[94]

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[89] United Nations, *Report of the World Food Conference, op. cit.*, p. 7-8.
[90] FAO, *The state of food and agriculture 1972*, Rome, 1972, p. 141-164.
[91] United Nations World Food Conference, *The world food problem, op. cit.*, p. 83-98.
[92] *Ibid.*, p. 96-98.
[93] Consultative Group on International Agricultural Research *International research in agriculture*, New York, 1974.
[94] United Nations, *Report of the World Food Conference, op. cit.* p. 7-8.

International policies

Most of the action required for food and agricultural development in the developing countries has, of course, to be carried out by and in these countries themselves. Nevertheless, international support for these domestic efforts has a crucial role, and is in fact the very essence of the IDS. Some of the areas where international cooperation is necessary, including world food security and agricultural research, have already been briefly discussed. It remains now to discuss development assistance, food aid, policies affecting international trade, and regional integration. All of these except for food aid feature prominently in the IDS. All of them are strongly emphasized in the Declaration and Programme of Action on the Establishment of a New International Economic Order.

Development assistance

The general failure of development assistance to increase in line with the targets of the IDS is well known, and need not be discussed in detail here. The strategy included no specific target for external assistance to agriculture. Indeed, until recently very little was known about the amount of the total assistance going to agriculture, and even now the information is far from adequate. The proposals presented to the WFC included estimates of the external assistance required for agriculture.

The Development Assistance Committee (DAC) has recently estimated that in 1972 at least $500 million, or about 7% of the net bilateral official development assistance (ODA) of the DAC countries, were committed for the direct or indirect development of agricultural production. Estimates for 1973 point to a rise to about $800 million, of which $600 million was in the form of capital projects and technical assistance and $200 million in fertilizers. This would represent about 8% of bilateral ODA in 1973, and 12 to 15% of what was reported as capital project assistance.[95] Preliminary estimates for 1974 indicate a further rise in DAC bilateral commitments to agriculture to about $1 300 million.

If multilateral assistance is added to these figures, it may be roughly estimated that the combined total of DAC commitments was of the order of about $2 400 million in 1973 and probably about $3 200 million in 1974.

A large and increasing share of World Bank loans is going to agriculture. World Bank commitments for agriculture increased from $436 million in 1971/72 to $938 million in 1972/73 and $956 million in 1973/74. Of the total loans approved in 1973/74, 22% was for agriculture, as compared with about 10% in the 1960s. An increasing proportion of these loans is being devoted to projects which directly help small farmers. Agriculture has also received a substantial share of the rapidly increasing loans of the regional development banks. Loans to the agricultural sector by the Asian Development Bank rose from $33 million in 1972 to $47 million in 1973, by the Inter-American Development Bank from $130 million to $182 million (although still below the 1970 figure of $216 million), and by the African Development Bank from 6 million to 9 million units of account (pre-devaluation United States dollars). As a proportion of the total loans granted by these banks in 1973, agriculture received 11% in Asia, 21% in Latin America, and 26% in Africa.

The above figures do not include aid from socialist countries or the substantial additional aid for agriculture that is becoming available from the oil-exporting countries. Very approximate estimates suggest that total aid commitments to agriculture from all sources rose from about $2 500 million in 1973 to about $3 500 million in 1974. Out of this total, capital aid (i.e. excluding technical assistance) represented about $2 200 million in 1973 and about $3 100 million in 1974.

In the proposals presented to the WFC it was estimated that external capital assistance for agriculture in the developing countries was around $1 500 million, which now appears to be considerably underestimated. It was also estimated that to meet the proposed production objectives this would have to rise to some $5 000 to 6 000 million by 1980. The major categories of external capital assistance included $2 500 million for land and water development, $1 000 million for crop and livestock development (including livestock processing facilities), $600 million for research and training, and $1 200 million for credit (including $200 million for revolving funds for the expansion of credit for current inputs).[96]

These estimated requirements do not include the external financial resources required for the construction of fertilizer plants in developing countries, or for industrial investment for processing agricultural products (except for meat and milk). Moreover, to the capital requirements discussed above must also be added a corresponding increase in technical assistance.

[95] Organisation for Economic Co-operation and Development, *Development cooperation, 1974 review, op. cit.*, p. 76.

[96] United Nations World Food Conference, *The world food problem, op. cit.*, p. 131-135.

It is clear that without major new initiatives to increase external funding for both capital and technical assistance, the available funds will fall far short of requirements. It would be necessary to mobilize an additional $2 000 to 3 000 million annually in order to achieve the required increase in production in the developing countries.

The WFC resolved that "an International Fund for Agricultural Development should be established immediately to finance agricultural development projects primarily for food production in the developing countries," that "all developed countries and all those developing countries that are in a position to contribute to this Fund should do so on a voluntary basis," and that "the Fund should become operative as soon as the Secretary-General of the United Nations determines ... that it holds promise of generating substantial additional resources for assistance to developing countries and that its operations have a reasonable prospect of continuity." [97] As regards other arrangements for follow-up action, the WFC requested the World Bank, FAO and UNDP to organize a Consultative Group on Food Production and Investment in Developing Countries.[98] The latter group has been set up, and there are good prospects that the new International Fund will begin operations in 1976.

Food aid

The important role of food aid in helping the developing countries meet their food import needs, as well as the abrupt reduction in the quantities available through such aid in 1973 and 1974, have already been discussed. The figures of external assistance to agriculture quoted above, however, do not include food aid, which totalled about $1 300 million in 1972 and $1 100 million in 1973.

The sources of food aid, which in the 1950s were virtually confined to the United States (which remains the largest donor), have gradually become more diversified and now include most DAC countries. Multilateral food aid has been available since the establishment in 1962 of the United Nations/FAO World Food Programme (WFP), which has accounted in recent years for about 10% of the total value of food aid.

In the past, food aid raised a number of problems, including those related to its possible adverse effects on domestic agricultural production in the developing countries and on normal commercial trade. Hence the inclusion in the IDS of the provision that "the machinery for consultation on surplus disposal ... will be widened and reinforced in order to avoid or minimize possible adverse effects of disposals of production surpluses or strategic reserves ... on normal commercial trade." [99] Since the strategy was adopted, the problems of food aid have changed radically with the drying up of the "surplus" stocks of cereals in the major exporting countries which have hitherto been its main source.

The WFC therefore laid considerable stress on the need for an improved policy for food aid. It recommended that all donor countries should "accept and implement the concept of forward planning of food aid," "make all efforts to ... ensure in physical terms at least 10 million tons of grains as food aid a year, starting from 1975," and "channel a more significant proportion of food aid through the World Food Programme." [100] Concerning arrangements for follow-up action, it recommended that "the Intergovernmental Committee of the World Food Programme be reconstituted so as to enable it to help evolve and coordinate short-term and longer-term food aid policies ... and to provide a forum for intergovernmental consultations ... with particular reference to possibilities of securing improved coordination between bilateral and multilateral food aid," and that the Intergovernmental Committee should be re-named the Committee on Food Aid Policies and Programmes.[101]

Since the WFC good progress has been made toward meeting the minimum target of 10 million tons of cereals as food aid, and total commitments for 1975/76 already amount to about 9 million tons.

Food aid has played an important role in the provision of emergency relief necessitated by natural and other disasters. The United States has been the major donor, with about half of the grants under Public Law 480 being given for emergencies during the past decade. From the establishment of the WFP until December 1974, 191 emergency projects have been carried out in 76 countries, costing about $153 million. The United Nations Disaster Relief Office was established in 1972 to coordinate relief operations, while entrusting the operational activities in food emergencies to the appropriate technical agencies and programmes. Thus FAO was charged with the leadership of the Sahelian Drought Relief Operation.

The WFC recommended that governments should "where possible, earmark stocks or funds for meeting international emergency requirements," and place part of these at the disposal of the WFP.[102]

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[97] United Nations, *Report of the World Food Conference, op. cit.*, p. 12.
[98] *Ibid.*, p. 19.

[99] United Nations, *Resolution adopted by the General Assembly during its Twenty-Fifth session, op. cit.* Resolution 2626 (XXV), para 30.
[100] United Nations, *Report of the World Food Conference, op. cit.*, p. 15-16.
[101] *Ibid.*, p. 18.
[102] *Ibid.*, p. 16.

International trade policies

The IDS particularly emphasized the improvement of international trade relations in favour of the developing countries, and especially the least developed countries. This aspect has been re-emphasized in the Declaration and Programme of Action on a New International Economic Order.

To the general problem of improving outlets for the agricultural exports of the developing countries there have now been added many new trade problems arising from the highly unstable conditions of the last few years. Some of the policy measures taken to meet these immediate difficulties have already been described. World markets for agricultural products appear likely to remain unstable for some time. A return to greater stability requires not only the rebuilding of food stocks, but also major improvements outside the food and agricultural sector, including adjustment to the higher oil prices, the reduction of inflation, and an improved world monetary system.

In the meantime, efforts to improve trade relations in favour of the agricultural exports of the developing countries have continued. A series of *ad hoc* consultations on commodities was held as provided by Resolution 83 (III) of the United Nations Conference on Trade and Development (UNCTAD). Between October 1973 and September 1974 consultations, sponsored jointly by FAO and UNCTAD, were held on 11 agricultural commodities or groups of commodities (rice; citrus fruit; jute, kenaf and allied fibres; oilseeds, oils and fats; hides and skins; hard fibres; bananas; cotton; tea; tobacco, and grains other than wheat). The main problems affecting international trade in each commodity were generally identified in these intensive discussions, but it did not prove possible to reach agreement on the specific measures to be recommended to governments in order to deal with these problems.

With respect to trade liberalization and access to markets, importing countries at these meetings generally expressed their willingness to examine the possibility of further liberalization measures for both primary and processed products on a most favoured nation basis within the wider framework of the multilateral trade negotiations in the General Agreement on Tariffs and Trade (GATT). Developing countries requested that imports should be liberalized, with the concession of preferential access in their favour under the Generalized System of Preferences, which so far covers agricultural products only to a limited extent.

International efforts toward stabilizing commodity prices with a view to increasing the export earnings of the developing countries were to some extent overtaken by the developments in 1973 and 1974 in international markets. Not all agricultural commodities shared in the price boom, however, and against this background governments have continued to work (for example, through the FAO Committee on Commodity Problems, the UNCTAD Committee on Commodities, and the various standing intergovernmental groups on commodities) for measures to stabilize prices at remunerative and equitable levels and to bring an expansion in agricultural exports from developing countries and long-term stability.

The inclusion of agricultural products in the current GATT negotiations is of particular significance. The Tokyo Declaration of September 1973, which launched the negotiations, established a Trade Negotiations Committee, with a group to develop an approach to negotiations which would take into account the special characteristics and problems of agriculture.

In contrast to the rather little progress made in the earlier years of DD2, during 1975 there has been considerable activity with regard to the renegotiation of existing international commodity agreements. The International Wheat Agreement of 1971 has been extended to 30 June 1976, by the entry into force of both protocols covering the Wheat Trade Convention and the Food Aid Convention. Discussions intended to lead to a new international agreement for grains have commenced both in the International Wheat Council and within the framework of the multilateral trade negotiations under the auspices of GATT.

A number of less formal commodity arrangements have continued in force. As for entirely new agricultural commodity agreements, the most likely ones to be proposed are for dairy products, rubber and tea. Negotiations are being initiated among the natural rubber producers on Malaysia's proposals for setting up an international stockpile to stabilize the world price. UNCTAD has recently proposed the creation of a multi-commodity buffer stock.

The current situation has emphasized the closely interrelated nature of agricultural production and trade that formed the basis of the FAO Conference Resolution on International Agricultural Adjustment at its Seventeenth Session in November 1973. The WFC, in addition to reiterating the need for most of the trade policy measures called for in the IDS, reaffirmed the importance of international agricultural adjustment and "the need for governments to work together toward greater consistency in their national and regional policies bearing on future changes in food and agriculture." It also stressed "the need for measures assuring the poorer sections of the rural population of their share in the opportunities and benefits offered by trade expansion," and requested governments and international organizations "to give the highest pos-

sible priority and the most favourable terms to the least developed, landlocked and island developing countries and to developing countries most seriously affected by economic crises." [103]

Regional economic integration

Denmark, Ireland and the United Kingdom have been applying the Common Agricultural Policy of the European Economic Community (EEC) since 1 February 1973. A trade, aid and cooperation agreement was concluded on 29 January 1975 between the EEC and 46 African, Caribbean and Pacific developing countries (ACPS). A major element is a commodity earnings stabilization scheme, to compensate the ACPS for losses resulting from falls in the prices of their commodity exports to the EEC. Agricultural products covered by the scheme include cocoa, coffee, cotton, copra, coconut, groundnuts and groundnut oil, palm products, bananas, and tea.

The Council for Mutual Economic Assistance (CMEA), covering the eastern European countries, the U.S.S.R., Cuba and Mongolia, provides for long-term contracts for agricultural products and for assistance to the less-developed member countries.

In Latin America, the Caribbean Common Market (CARICOM) and the Andean Pact have moved ahead rapidly in recent years, while progress has slowed down in the Latin American Free Trade Association (LAFTA) and the Central American Common Market (CACM). The main objectives of CARICOM, created on 4 July 1973, include the rationalization of agriculture. The Andean Pact countries have recently established an agricultural council to analyse periodically the progress of agricultural integration; units dealing with this problem are to be strengthened in the ministries of agriculture of the member countries.

In the Far East, the Association of South East Asian Nations (ASEAN) has decided to move toward some kind of economic community along the lines of the EEC. Bangladesh, Cambodia, India, the Philippines, Sri Lanka and the Republic of South Viet-Nam signed an agreement setting up an Asian Rice Trade Fund in 1974. Other groupings around special interests or commodities, such as the Asian Coconut Community and the Asian Pepper Community, continue to make progress. Currently there are initiatives for the establishment of a Timber Community.

Development plans in the Near East region are giving increasing attention to regional integration but progress is still relatively slow. Efforts are being made to incorporate other Arab countries in the Council for Arab Economic Unity.

In Africa a recent initiative has been the establishment by the Sahelian countries of the Permanent Inter-State Committee for Drought Control in the Sahelian Zone (CILSS). There are good prospects, particularly in eastern Africa, for the setting up of regional food reserves, a measure that has been advocated for some years by the Organization for African Unity. Other continuing initiatives include the West African Rice Development Association (WARDA).

The WFC invited the developing countries to "expand their mutual economic cooperation" and invited "the developed countries and the international organizations concerned to maintain and expand their support for economic cooperation among developing countries." [104]

[103] *Ibid.*, p. 16-17.

[104] *Ibid.*, p. 17.

Conclusions

This broad review and appraisal of the main developments in the world's food and agricultural sector during the first four years of DD2 gives little grounds for comfort and none for complacency. Indeed, one of the most positive developments is that the former widespread complacency about food and agriculture may now once and for all have been dispelled. Both individually and collectively, governments have concentrated more attention on the food and agricultural sector during the last few years than ever before.

In many crucial areas either the situation has actually deteriorated or, if there has been progress, it has slowed down in comparison with the previous decade. Food and agricultural production has increased much more slowly than during DD1, and in the developing countries has fallen behind the growth of population. Although the terms of trade of agricultural products in world markets have improved, the food imports of the developing countries have risen much faster than their agricultural exports, and the larger part of the gains in agricultural trade has accrued to the developed countries. International prices of food and agricultural products have been highly unstable and many of them have risen very steeply. Many developing countries face extreme difficulties in obtaining and paying for essential imports of food and fertilizers.

Stocks of basic cereals have fallen well below min-

imum safety levels, and for three years in succession the world's food supplies have depended precariously on the outcome of the current harvests, and thus on the weather. Although up-to-date information on food consumption and nutrition is not available, it is clear that the sharp falls in per caput food production in many developing countries, combined with the shortage and high price of importable supplies and the reduction in food aid, have caused a serious deterioration in the nutritional situation. Even where there has been no physical shortage of food, rapidly rising consumer food prices have caused severe hardship for the poorest people.

The unstable relations between product and input prices have caused difficulties for farmers in developed and developing countries alike, and producer price policies will require careful adjustment in order to maintain incentives. Except in a few cases, there is no sign of any narrowing of the wide gap, particularly in developing countries, between agricultural and non-agricultural incomes and between the availability of social services and amenities in rural and urban areas. Income inequalities have generally probably increased between the more and less favoured agricultural areas within countries, and between small and large farmers. It seems likely that agricultural and rural underemployment have worsened in many developing countries, especially where a rapid growth in the agricultural labour force has been accompanied by a particularly slow increase in agricultural production.

Except for a few notable successes, like wheat in India and rice in Pakistan, yields per hectare of the major crops have risen much less than is needed. In a number of countries where expanded and more effective irrigation is essential, the irrigation targets in national plans have not been met. The shortage and high price of fertilizers and pesticides and of fuel for irrigation pumping and for other farm machinery have caused additional difficulties in many countries. These special difficulties, together with the fluctuations that have occurred as a result of the weather, have made it hard to appraise the recent progress of the green revolution technology, but there is no doubt that greatly increased efforts will be needed for this to regain its former momentum.

There has been increased recognition of the need for far-reaching changes in the basic structure of rural institutions and services, not only in order to mobilize rural people for increasing production, but also to enable them to play a fuller part in society and share more fully in the benefits of development. Increasingly these changes have been seen in the broader context of integrated rural development, and in terms of the need to concentrate development programmes and projects more specifically on the small farmers and other rural poor. Here too, however, only partly because of the lack of quantitative information, there is little evidence of concrete progress except in isolated cases. Government services to farmers in most developing countries still pay far too little attention to the innovative approaches needed to meet the special problems posed by the shortage of trained manpower and the fact that the agricultural sector consists mainly of millions of scattered small farmers.

International development assistance for the agriculture of the developing countries, and especially for agricultural research, has recently shown an encouraging expansion. However, it remains far below the levels necessary for the attainment of the DD2 agricultural production target, and future prospects remain clouded by the general failure to meet the IDS targets for development assistance. The improvements in international trade relations stressed in the IDS have received new emphasis in the Declaration and Programme of Action on the Establishment of a New International Economic Order. In the agricultural sector, the need for measures of international agricultural adjustment is gaining wider acceptance, and there is broad agreement on the necessary international cooperation for world food security and stock holding. An encouraging sign is that commitments of food aid for 1975 have already almost reached the minimum target agreed by the WFC. In general, however, there has been little concrete achievement in the improvement of trade relations, only in part because of the highly unstable state of world trade during the first four years of DD2.

Four years are, of course, a very short period over which to attempt to review and appraise progress, particularly in a sector like food and agriculture that is always subject to annual fluctuations, and particularly when these years have been characterized by such profound and unforeseen changes in the world economy as have occurred recently. Moreover, a global review and appraisal, which is all that could be attempted here, is liable to overlook many of the successes in particular fields in individual countries that help to relieve the disappointing over-all picture.

But, although developments during the last four especially unstable years must be viewed with caution as an indication of trends, it must be stressed that most of the longer term trends have also been highly unsatisfactory. Agricultural production has been particularly seriously affected by the weather in two out of the last four years, but this must not be allowed to obscure the fact that the disappointing course of production during this period also reflects inadequate attention to agriculture and inadequate policies within

the agricultural sector. If the basis had been laid earlier for a faster, sustained increase in production, the level of production in an "average" year would have been higher and the effects of the fluctuations caused by the weather less severe.

Many agricultural policy measures, especially in the institutional field, take some years to bear fruit. Thus the present review of the first four years of DD2 is to a great extent a review of the effects of policy measures taken before the beginning of the decade. The many policy changes that are likely to appear necessary in the light of the mid-term review and appraisal will have to be formulated and implemented with great speed and urgency if they are to have much influence on the course of events during the rest of DD2.

Much greater political will is needed if the IDS, modified or not, is to be implemented in such a way as to materially affect economic and social development in the rest of the decade. Many of the recommendations agreed in 1974 by the WFC, except for those aimed at solving immediate problems, were already foreshadowed in the IWP when it was published in 1969. Five years in which the international community could have begun many of the necessary concerted measures have to a large extent been lost, not because of the lack of solutions to problems but because of the lack of political will to implement these solutions. The need for political decisions has been recognized by the establishment of the World Food Council at ministerial or plenipotentiary level, as called for by the WFC.[105]

Implications for the International Development Strategy

The fact that so far in DD2 there has been so conspicuous a failure to achieve the targets and other objectives of the IDS should not, of course, be taken to mean that the Strategy was a mistaken one. Indeed, the validity of one of the principal targets, the acceleration of the average increase in agricultural production in the developing countries to around 4% a year, has been amply confirmed. Moreover, the events of the first four years of DD2 have emphasized as never before the increasing interdependence of all countries of the world and the need for concerted action. Equally, however, the fact that the failure to implement the Strategy has stemmed so largely from profound changes that it was impossible to foresee should not be taken to mean that the Strategy requires no modifications or additions.

The Strategy should perhaps be tied less rigidly to the time period of a decade. This may be a useful period for the expression of certain targets, and for the purposes of review and appraisal and the periodic evaluation of the Strategy itself. But, at least in the food and agricultural sector, strategy cannot be satisfactorily expressed purely in terms of a decade. The IWP already envisaged some modifications in strategy as between the period up to 1975 and 1975-85.[106] The WFC was focused mainly on the period up to 1985. FAO is now beginning the preparation of a global perspective study of food and agricultural development covering the 1980s.

At the other extreme, it is clearly necessary to find room in the Strategy for the immediate, short-term measures that are required both to meet emergency needs and to achieve a speedy return to more stable conditions. In the food and agricultural sector this would mainly imply measures to ensure essential imports of food, fertilizers and pesticides for the most seriously affected countries, the rapid rebuilding of food stocks to safe levels, and the "emergency programmes for supplementary feeding of a substantial number of the malnourished children" that the WFC recommended should be begun in 1975-76. Such emergency assistance has hitherto been considered separately from longer term development programmes, but it is now becoming clear that emergencies can have a much wider scope than previously understood, and that a new component to meet immediate needs should be introduced as part of development policy itself.[107]

A problem concerning the time horizon of the IDS now arises from the basic target of a 4% average annual increase in the agricultural production of the developing countries. If this target is to be achieved for the decade as a whole, an average annual increase of 5.3% is required in the next six years. This is hardly feasible, but the 4% growth rate still appears a reasonable target for the remainder of the decade and beyond. If this were achieved it would result, however, in an average annual increase of only 3.1% during DD2 as a whole, with consequent reductions in other related targets.

In the light of these various problems of timing, the best solution might be for the IDS to cover a number of different time horizons, both within and beyond a decade, and for it to be prepared on a "rolling" basis.

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[105] United Nations, *Report of the World Food Conference, op. cit.*, p. 18.

[106] FAO, *Provisional Indicative World Plan for Agricultural Development*, Rome, 1969, Vol. 2, p. 658-661.

[107] Organisation for Economic Co-operation and Development, *Development cooperation, 1974 review, op. cit.*, p. 27-29.

It is now possible to add greater precision and concreteness to many of the policy measures specified in the IDS as required for the implementation of the basic targets. A case in point is paragraph 75 of the IDS on policy measures required in the agricultural sector, quoted at the beginning of this chapter. On the basis of the recommendations of the WFC, this could now be made much more concrete and precise. Similarly, while there are a few references to women in the IDS, these could be added to on the basis of the recommendations of both the WFC and the WPC, and the recent World Conference of International Women's Year. Environmental considerations are briefly mentioned in the IDS, but these references can now be considerably expanded on the basis of the recommendations of the United Nations Conference on the Human Environment. FAO has submitted to the United Nations some suggestions concerning food and agricultural aspects of environmental considerations for inclusion in the IDS.

However, the main implication for the IDS that emerges from this review and appraisal of progress in the food and agricultural sector during DD2 is that for the rest of the decade and for many years beyond it the Strategy should give much higher priority to agriculture. This is not only because of the difficult food supply situation, but also because a strategy to benefit the poorest people must concentrate on the agricultural and rural sectors where most of them are to be found.

Higher priority for agriculture particularly implies greatly increased domestic investment and development assistance for the agricultural sectors of the developing countries. However, although it is in these countries that the biggest acceleration of production is required, recent developments have also made it clear that the strategy should be worldwide in nature and encompass the food production of the developed countries as well, even if it does not set specific targets in this regard.

The IDS should also be broadened by the addition of other items that have come to the fore since it was adopted in 1970. These include especially world food security, international agricultural adjustment, and the need for a world fertilizer policy. As regards food aid, which was omitted from the IDS, the need for forward planning and the new international target of a minimum of 10 million tons of cereals a year adopted by the WFC are particularly suitable for inclusion. Many other recommendations of the WFC are also relevant to the vision of the IDS.

In fact, in all but the most formal sense, the Declaration on the Eradication of Hunger and Malnutrition and the resolutions of the WFC,[108] which were subsequently adopted by the General Assembly at its Twenty-Ninth Session, already represent agreed additions to the international strategy for the food and agricultural sector. Many of the relevant provisions have been mentioned in earlier parts of this document, and there is no need to summarize them again here.

There remain two other types of modification and addition that might be considered for the IDS. The first concern the need for better data for review and appraisal. The experience gained in the first mid-term review and appraisal exercise could be used to determine more precisely the data that are needed in such fields as rural underemployment, income distribution and institutional changes, and for the better identification of the rural poor. Efforts might also be made to give the IDS greater operational significance at the country level. It is not suggested, of course, that targets should be specified for individual countries, although some could perhaps be set for smaller, more homogeneous groups than such broad ones as the developing countries as a whole. But it should be possible to make use of the substantial assistance in agricultural and over-all development planning provided by the United Nations system in order to bring the IDS more effectively to the country level. Initiatives like FAO's Country Perspective Studies might also be adapted to serve this purpose more fully. Studies of this kind can also contribute greater realism to the Strategy at world level, and they will be an important input for FAO's proposed global perspective study covering the 1980s.

Finally, it is necessary to refer to the most ambitious of all of the WFC's recommendations. This states that "all governments should . . . accept the goal that within a decade no child will go to bed hungry, that no family will fear for the next day's bread, and that no human being's future and capacities will be stunted by malnutrition."[109] This clearly goes well beyond the scope of the already massive package of agricultural development measures presented to and broadly agreed by the WFC. Its full implications have yet to be worked out, and their examination is likely to be one of the first tasks of the newly-established World Food Council. But it seems highly desirable that a modified International Development Strategy should include a target date, accepted by the whole international community, for the final elimination of hunger and malnutrition from the world.

[108] United Nations, *Report of the World Food Conference, op. cit.*, p. 1-19.
[109] *Ibid.*, p. 4.

Appendixes to Chapter 2

TABLE 2-A. — POPULATION, FOOD SUPPLY AND DEMAND FOR FOOD IN INDIVIDUAL COUNTRIES

Region and country	Annual rates of growth			Per caput daily		
	Population	Food production [1]	Domestic demand for food [2,3]	Dietary energy supply [3,4]		Protein supply [3,4]
	..... *Percent* [5]			*Kilocalories*	*Percent of requirements* [6]	*Grams*
DEVELOPED COUNTRIES						
Western Europe						
European Economic Community						
Belgium-Luxembourg	0.5	2.2	1.2	3 380	128	95
Denmark	0.7	0.0	1.3	3 240	120	93
France	1.0	2.3	2.0	3 210	127	105
Germany, Fed. Rep. of	0.8	1.9	1.9	3 220	121	89
Ireland	0.6	2.3	0.3	3 410	136	103
Italy	0.8	1.9	2.3	3 180	126	100
Netherlands	1.2	3.4	1.7	3 320	123	87
United Kingdom	0.5	2.3	0.7	3 190	126	92
Other western Europe						
Austria	0.5	1.3	1.1	3 310	126	90
Finland	0.3	1.5	1.1	3 050	113	93
Greece	0.5	4.6	2.3	3 190	128	113
Iceland	1.3	0.8	1.4	3 180	120	101
Malta	—0.1	4.3	1.2	2 820	114	89
Norway	0.8	1.2	1.3	2 960	110	90
Portugal	0.9	0.8	2.3	2 900	118	85
Spain	1.1	3.4	3.0	2 600	106	81
Sweden	0.6	1.0	1.0	2 810	104	86
Switzerland	1.3	1.6	1.9	3 190	119	91
Yugoslavia	1.0	3.1	2.4	3 190	125	94
Eastern Europe and the U.S.S.R.						
Albania	1.1	3.9	4.6	2 390	99	74
Bulgaria	0.7	3.3	2.8	3 290	132	100
Czechoslovakia	0.5	3.2	1.9	3 180	129	94
German Dem. Rep.	—0.5	3.0	0.8	3 290	126	87
Hungary	0.3	3.9	1.9	3 280	125	100
Poland	0.9	2.5	2.3	3 280	125	101
Romania	1.0	3.8	2.7	3 140	118	90
U.S.S.R.	1.1	3.1	3.0	3 280	131	101
North America						
Canada	1.6	1.6	2.5	3 180	129	101
United States	1.1	2.3	1.6	3 330	126	106
Oceania						
Australia	1.8	3.3	2.4	3 280	123	108
New Zealand	1.7	2.2	2.0	3 200	121	109
Other regions						
Israel	2.9	6.1	4.9	2 960	115	93
Japan	1.0	2.1	3.7	2 510	107	79
South Africa	2.4	4.0	3.2	2 740	112	78
DEVELOPING COUNTRIES						
Latin America						
Argentina	1.5	1.4	2.0	3 060	115	100
Barbados	0.1	—1.4	...	...	...	...
Bolivia	2.4	3.8	2.7	1 900	79	46
Brazil	2.9	3.7	4.0	2 620	110	65
Chile	2.1	1.3	3.3	2 670	109	77
Colombia	3.5	3.2	3.9	2 200	95	51
Costa Rica	3.2	5.9	4.8	2 610	116	66
Cuba	2.0	1.5	2.0	2 700	117	63
Dominican Rep.	3.4	3.8	3.6	2 120	94	48
Ecuador	3.4	2.2	4.0	2 010	88	47
El Salvador	3.4	3.4	4.1	1 930	84	52
Guatemala	2.9	3.8	4.2	2 130	97	59
Guyana	2.8	2.9	3.6	2 390	105	58
Haiti	2.5	1.7	2.2	1 730	77	39
Honduras	3.4	5.1	4.2	2 140	94	56
Jamaica	2.2	1.1	3.3	2 360	105	63

See notes at end of table.

TABLE 2-A. — POPULATION, FOOD SUPPLY AND DEMAND FOR FOOD IN INDIVIDUAL COUNTRIES (*concluded*)

Region and country	Annual rates of growth			Per caput daily			Region and country	Annual rates of growth			Per caput daily		
	Population	Food production [1]	Domestic demand for food [2,3]	Dietary energy supply [2,4]		Protein supply [3,4]		Population	Food production [1]	Domestic demand for food [2,3]	Dietary energy supply [2,4]		Protein supply [3,4]
	..... *Percent* [5]			*Kilocalories*	*Percent of requirements* [6]	*Grams*		..... *Percent* [5]			*Kilocalories*	*Percent of requirements* [6]	*Grams*
DEVELOPING COUNTRIES (*cont'd*)							Saudi Arabia	2.8	4.0	5.0	2 270	94	62
							Somalia	2.3	3.3	1.5	1 830	79	56
							Sudan	3.1	4.8	3.9	2 160	98	48
							Syria	3.3	1.0	4.6	2 650	107	75
Latin America (*concluded*)							Turkey	2.7	3.1	3.8	3 250	129	91
							Yemen Arab Rep.	2.8	0.9	3.9	2 040	84	61
Mexico	3.5	3.7	4.3	2 580	111	62	Yemen, People's Dem. Rep. of	2.8	2.3	—1.0	2 070	86	57
Nicaragua	3.0	3.9	3.9	2 450	109	71							
Panama	3.3	4.4	4.8	2 580	112	61							
Paraguay	3.5	2.7	3.4	2 740	119	73							
Peru	3.1	2.7	3.9	2 320	99	60	**Africa**						
Surinam	3.1	6.7	4.0	2 450	109	59							
Trinidad and Tobago	1.3	2.8	4.8	2 380	98	64	Algeria	3.2	1.3	3.4	1 730	72	46
Uruguay	1.2	0.7	1.2	2 880	108	100	Angola	2.0	2.3	3.0	2 000	85	42
Venezuela	3.4	4.6	4.0	2 430	98	63	Botswana	2.1	5.0	...	2 040	87	65
							Burundi	2.3	7.5	2.4	2 040	88	62
							Cameroon	2.1	4.4	2.5	2 410	104	64
Far East							Central African Rep.	2.1	1.4	1.1	2 200	98	49
							Chad	2.3	—2.1	1.2	2 110	89	75
Bangladesh	3.5	1.8	...	1 840	80	40	Congo	2.2	—0.3	3.7	2 260	102	44
Burma	2.3	1.4	3.3	2 210	102	50	Dahomey	2.6	2.8	3.1	2 260	98	56
Cambodia	2.9	—1.4	4.3	2 430	109	55	Ethiopia	2.1	1.7	3.0	2 160	93	72
China	1.8	2.7	...	2 170	91	60	Gabon	0.8	2.9	2.4	2 220	95	57
India	2.2	2.2	3.0	2 070	94	52	Gambia	2.1	3.2	...	2 490	104	64
Indonesia	2.8	3.2	2.6	1 790	83	38	Ghana	3.1	3.4	3.2	1 320	101	49
Korea, Dem. People's Rep. of	2.8	2.7	...	2 240	89	73	Guinea	2.3	1.7	3.4	2 020	88	45
Korea, Rep. of	2.5	3.2	4.7	2 520	107	68	Ivory Coast	2.4	4.7	2.6	2 430	105	56
Laos	2.5	4.9	3.7	2 110	95	49	Kenya	3.1	3.0	4.7	2 360	102	67
Malaysia (West)	2.8	6.2	4.3	2 460	110	54	Lesotho	1.8	0.8	...	...	...	...
Mongolia	3.1	0.3	...	2 380	106	106	Liberia	1.8	1.5	1.8	2 170	94	39
Nepal	2.2	1.0	2.1	2 080	95	49	Madagascar	2.7	1.9	2.1	5 330	111	58
Pakistan	3.1	4.6	4.2	2 160	93	56	Malawi	2.5	4.5	3.7	2 210	95	63
Philippines	3.4	3.3	4.2	1 940	86	47	Mali	2.4	—0.8	4.3	2 060	88	64
Sri Lanka	2.4	1.9	3.1	2 170	98	48	Mauritania	2.2	—0.8	3.0	1 970	85	68
Thailand	3.3	3.5	4.6	2 560	115	56	Mauritius	1.9	1.9	3.0	2 360	104	48
Viet-Nam, Dem. Rep. of	2.3	1.1	...	2 350	114	53	Morocco	3.3	4.5	3.3	2 220	92	62
Viet-Nam, Rep. of South	2.2	2.7	3.2	2 320	107	53	Mozambique	2.1	2.6	3.2	2 050	88	41
							Niger	3.0	—0.2	2.2	2 080	89	74
							Nigeria	2.6	0.6	3.1	2 270	96	63
							Rhodesia	3.4	2.9	4.1	2 660	111	76
							Rwanda	2.9	3.6	1.9	1 960	84	58
Near East							Senegal	2.4	—0.8	1.2	2 370	100	65
							Sierra Leone	2.3	3.0	3.9	2 280	99	51
Afghanistan	2.4	1.5	2.2	1 970	81	58	Tanzania	2.6	3.9	3.0	2 260	98	63
Cyprus	0.9	5.7	2.3	2 670	108	6	Togo	2.6	1.7	2.4	2 330	101	56
Egypt	2.8	3.2	3.8	2 500	100	69	Tunisia	3.1	4.0	4.3	2 250	94	67
Iran	3.0	3.6	5.4	2 300	96	60	Uganda	2.6	2.5	3.2	2 130	91	61
Iraq	3.5	4.2	5.2	2 160	90	60	Upper Volta	2.1	—0.4	1.2	1 710	72	59
Jordan	3.3	—4.6	6.6	2 430	99	65	Zaire	2.2	4.1	2.3	2 060	93	33
Lebanon	3.0	4.5	3.1	2 280	92	63	Zambia	3.0	2.8	4.8	2 590	112	68
Libya	3.2	5.6	...	2 570	109	62							

[1] Food component of crop and livestock production only (i.e. excluding fish production). — [2] Calculated on basis of growth of population and per caput income, and estimates of income elasticity of farm value of demand in FAO *Commodity projections 1970-1980*, Rome, 1971. — [3] Total food, including fish. — [4] 1969-71 average. — [5] Exponential trend, 1961-74. — [6] Revised standards of average requirements (physiological requirements plus 10 % for waste at household level).

TABLE 2-B. — AGRICULTURAL PRODUCTION IN DEVELOPING COUNTRIES IN COMPARISON WITH OBJECTIVES PROPOSED IN THE INDICATIVE WORLD PLAN [1]

Region and country	Index numbers of agricultural production					Average annual increase [2]		IWP objectives	
	1970	1971	1972	1973	1974 [3]	1961-74	1970-74	1961-63 to 1975	1975 to 1985
	1961-65 average = 100					*Percent per year*			
AFRICA									
Algeria	111	107	127	110	103	1.5	—1.2	[4] 3.2	4.6
Angola	122	126	123	121	129	2.4	0.8	...	...
Botswana	137	156	140	160	173	4.9	5.0	...	...
Burundi [5]	150	166	209	212	232	7.5	11.8	...	...
Cameroon	139	142	148	142	151	4.4	1.7	2.9	2.7
Central African Rep.	111	115	118	118	119	1.6	1.7	2.8	2.5
Chad [5]	102	103	82	75	79	—1.7	—7.9	2.7	3.0
Congo	93	95	97	99	104	—0.2	2.7	2.8	3.4
Dahomey [5]	133	134	130	141	149	3.5	2.8	3.4	3.4
Ethiopia [5]	118	118	120	120	114	1.8	—0.6	2.5	2.9
Gabon	126	128	131	132	132	2.9	1.3	1.4	1.3
Gambia	117	124	123	138	147	3.2	5.7	3.0	2.8
Ghana	124	137	136	137	142	3.4	2.8	3.1	3.4
Guinea [5]	119	120	114	112	118	1.7	—0.8	...	...
Ivory Coast	132	147	147	154	161	4.9	4.6	4.7	3.3
Kenya	129	124	130	132	134	2.8	1.4	3.8	3.9
Lesotho [5]	105	105	80	122	111	0.5	2.6	...	...
Liberia	130	134	134	135	155	3.7	3.7	...	...
Madagascar	118	117	115	116	127	2,0	1,4	3,1	3,1
Malawi [5]	130	144	160	157	162	4.6	5.6	3.3	3.4
Mali [5]	109	118	95	75	96	—0.4	—6.7	3.0	3.5
Mauritania	112	108	95	80	81	—0.8	—9.2	2.7	3.4
Mauritius	101	110	120	125	119	1.9	4.6	...	...
Morocco	144	147	149	132	152	4.4	0.1	[4] 3.5	3.6
Mozambique	119	120	125	130	127	2.4	2.3	...	...
Niger [5]	117	106	105	76	96	—0.2	—6.9	3.0	3.2
Nigeria	107	110	107	95	105	0.6	—2.0	3.1	3.4
Rhodesia	100	115	126	102	144	1.9	6.4	...	...
Rwanda [5]	145	148	145	151	131	3.6	—1.8	...	...
Senegal	82	115	74	90	100	—0.6	1.6	3.2	3.2
Sierra Leone	124	127	132	130	136	3.0	2.2	...	...
Tanzania [5]	141	133	136	138	138	3.4	—0.1	3.6	3.0
Togo	135	133	106	97	116	1.8	—6.1	2.8	3.8
Tunisia	118	142	129	155	149	4.0	5.6	[4] 3.4	4.0
Uganda [5]	128	123	125	122	123	2.4	—0.9	3.9	2.9
Upper Volta [5]	119	113	107	90	77	—0.1	—10.4	2.4	2.9
Zaire	136	130	139	150	161	4.0	4.9	2.7	3.4
Zambia	119	122	127	130	141	2.7	4.1	5.0	4.8
FAR EAST									
Bangladesh	116	104	106	124	114	1.5	1.4	[6] 4.1	[6] 4.6
Burma	110	111	105	118	117	1.5	1.9	...	...
Cambodia	139	106	86	61	48	—2.8	—23.5	...	...
China	123	127	125	131	135	2.8	2.2	...	...
India	121	123	118	127	121	2.1	0.2	3.4	3.9
Indonesia	122	125	126	140	145	3.1	4.5	...	[7] 4.3
Korea, Dem. People's Rep. of	117	122	123	130	136	2.6	3.8	...	...
Korea, Rep. of	131	132	136	138	140	3.6	1.9	3.4	2.4
Laos [5]	152	144	145	155	160	4.9	1.7	...	...
Malaysia (West)	154	164	166	190	193	6.2	6.2	3.8	4.8
Mongolia	98	100	103	110	110	0.4	3.3	...	...
Nepal [5]	111	111	104	115	110	1.1	0.2	...	...
Pakistan	147	148	151	155	157	4.7	1.8	[8] 4.1	[8] 4.6
Philippines	125	126	130	142	143	3.2	3.8	4.2	4.6
Sri Lanka	117	116	116	114	122	1.8	0.7	4.3	4.1
Thailand	130	136	130	155	142	3.6	3.1	4.4	4.3
Viet-Nam, Dem. Rep. of	109	103	112	112	114	1.0	1.8	...	...
Viet-Nam, Rep. of South	110	119	119	130	134	2.3	4.1	...	...

See notes at end of table.

TABLE 2-B. — AGRICULTURAL PRODUCTION IN DEVELOPING COUNTRIES IN COMPARISON WITH OBJECTIVES PROPOSED IN THE INDICATIVE WORLD PLAN [1] (*concluded*)

Region and country	Index numbers of agricultural production					Average annual increase [2]		IWP objectives	
	1970	1971	1972	1973	1974 [3]	1961-74	1970-74	1961-63 to 1975	1975 to 1985
	..... *1961-65 average = 100*					..... *Percent per year*			
LATIN AMERICA									
Argentina	113	106	109	112	116	1.2	1.1	2.5	2.5
Barbados	101	92	77	87	83	—1.4	—4.2	...	...
Bolivia	129	136	142	151	156	4.1	4.9	3.1	3.2
Brazil	128	131	140	138	149	3.6	3.6	2.5	3.0
Chile	118	117	113	95	117	1.4	—2.2	2.6	3.1
Colombia	126	130	132	136	145	3.3	3.2	3.1	3.6
Costa Rica	155	163	175	172	174	5.8	2.9	...	[9] 5.1
Cuba	131	114	104	112	119	1.4	—2.1	...	...
Dominican Rep.	126	134	143	147	150	3.6	4.4	...	...
Ecuador	125	128	121	120	121	2.3	—1.2	2.7	3.3
El Salvador	113	126	123	133	140	2.9	5.1	...	[9] 3.7
Guatemala	128	134	143	149	155	4.2	5.1	...	[9] 4.4
Guyana	122	135	128	125	143	2.9	2.4	...	...
Haiti [5]	108	113	115	118	120	1.6	2.7	...	...
Honduras	139	157	154	169	153	4.8	2.7	...	[9] 5.3
Jamaica	104	112	108	108	114	1.0	1.4	...	...
Mexico	122	131	130	130	135	3.0	1.9	4.0	4.3
Nicaragua	123	132	138	141	154	4.2	5.1	...	[9] 5.3
Panama	141	152	152	153	159	4.7	2.6	...	...
Paraguay	125	124	122	133	136	4.5	2.5	3.2	3.5
Peru	121	121	120	119	118	1.9	—0.7	2.9	3.1
Surinam	172	181	172	195	188	6.7	2.6	...	...
Trinidad and Tobago	124	130	132	128	130	2.9	0.7	...	...
Uruguay	111	97	90	94	101	3.8	—2.3	2.6	3.1
Venezuela	148	150	153	161	177	4.4	4.3	3.6	4.2
NEAR EAST									
Afghanistan [5]	103	98	112	119	126	1.5	6.2	2.6	3.1
Cyprus	152	180	172	137	178	5.5	4.0	...	...
Egypt	123	127	129	130	132	3.0	1.5	3.2	2.9
Iran	137	126	141	144	146	3.6	2.7	3,8	3.8
Iraq	134	131	182	131	152	4.2	2.7	3.4	4.3
Jordan	48	66	77	40	79	—4.2	5.2	3.1	4.0
Lebanon	121	142	161	152	170	4.6	7.7	3.7	3.7
Libya	117	110	174	200	201	5.5	19.5	...	...
Saudi Arabia	130	138	143	145	155	3.9	4.2	3.6	3.9
Somalia [5]	125	124	137	138	139	3.2	3.2	...	...
Sudan [5]	149	155	154	149	169	4.8	2.2	3.6	3.7
Syria	85	89	135	84	126	1.0	7.6	3.3	3.7
Turkey	126	134	139	129	146	3.3	2.7	...	...
Yemen Arab Rep. [5]	82	108	119	119	112	1.0	7.5	...	...
Yemen, People's Dem. Rep. of	110	118	112	124	127	2.0	3.4	[10] 3.4	[10] 4.0

[1] FAO. *Provisional Indicative World Plan for Agricultural Development*, Rome, 1969. — [2] Exponential trend; minus sign denotes decrease. — [3] Preliminary. — [4] 1965 to 1975. — [5] Belongs to group of least developed countries. — [6] Includes Pakistan. — [7] 1970 to 1980, from *Perspective study of agricultural development (provisional) for Indonesia 1970-80*, Rome, FAO. 1972. — [8] Includes Bangladesh. — [9] Projected growth rates 1970 to 1990 of "Trend variant with high export growth" from *Perspective plan for agricultural development and integration in Central America*, (provisional version), Rome, FAO. — [10] Former Federation of South Arabia.

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ANNEX TABLE 1. — VOLUME OF PRODUCTION OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	Million metric tons												
World													
AGRICULTURAL PRODUCTS													
Wheat	259.00	239.63	277.25	267.57	310.16	299.08	332.02	314.39	318.31	353.96	346.82	377.27	360.23
Barley	98.90	101.81	109.29	106.30	117.26	119.68	131.25	136.87	139.43	151.50	153.31	169.24	170.90
Oats	50.26	47.37	44.32	46.61	48.57	50.79	54.29	55.11	55.36	57.74	51.30	54.38	51.23
Maize	209.92	221.78	215.88	227.90	242.20	266.98	252.59	267.07	261.98	305.77	305.39	310.39	292.99
Rice (milled equivalent) [1]	159.35	165.84	172.79	166.84	165.94	179.95	184.66	190.93	199.56	199.88	192.15	210.91	210.08
Sugar (centrifugal)	51.35	53.11	62.88	63.81	64.22	66.21	66.29	67.19	73.30	75.02	74.25	78.34	78.76
Apples	19.88	18.69	19.63	19.54	19.20	22.18	20.51	23.13	21.41	21.15	19.44	22.37	21.37
Citrus fruit	24.48	24.53	25.41	27.59	30.81	33.66	33.11	36.74	37.53	39.45	41.24	43.14	43.91
Bananas	21.63	22.82	24.31	26.32	27.13	27.97	28.11	29.56	30.75	33.84	34.82	35.52	35.84
Olive oil	1.00	1.94	1.00	1.35	1.36	1.50	1.59	1.38	1.60	1.66	1.61	1.69	1.52
Soybeans	30.87	31.66	32.35	36.51	39.08	40.74	44.00	45.19	46.47	48.48	52.34	62.31	56.80
Groundnuts	15.53	16.07	16.99	16.03	16.10	17.54	16.10	17.22	18.43	19.28	15.95	17.06	17.59
Cottonseed	19.30	20.60	21.31	22.06	20.73	20.20	21.85	21.62	22.16	23.48	24.70	24.91	25.95
Copra	3.21	3.70	3.50	3.50	3.70	3.40	3.50	3.40	3.60	3.90	4.40	3.70	3.60
Total vegetable oils and oilseeds (oil equivalent)	25.89	26.85	27.21	28.57	29.17	29.89	30.92	31.37	33.71	35.03	34.46	37.68	36.97
Coffee	4.67	4.26	3.69	5.06	3.89	4.46	3.83	4.32	3.87	4.96	4.69	4.10	4.91
Cocoa	1.20	1.25	1.55	1.22	1.34	1.39	1.24	1.41	1.51	1.61	1.45	1.35	1.47
Tea	1.09	1.12	1.15	1.17	1.22	1.24	1.30	1.33	1.38	1.40	1.52	1.57	1.60
Wine	28.49	25.80	28.49	28.83	27.28	28.49	28.28	27.65	30.28	28.67	28.10	34.35	34.33
Tobacco	4.12	4.50	4.86	4.54	4.53	4.84	4.72	4.58	4.62	4.52	4.94	4.96	5.22
Cotton (lint)	10.57	11.12	11.51	11.96	11.11	10.70	11.64	11.57	11.96	12.54	13.30	13.40	13.67
Jute [2]	3.12	3.32	3.32	3.47	3.72	4.10	2.84	3.73	3.58	3.37	3.70	4.21	3.45
Sisal, henequen and other agaves	0.83	0.86	0.91	0.89	0.88	0.84	0.80	0.84	0.82	0.80	0.79	0.83	0.93
Wool (greasy)	2.58	2.59	2.60	2.66	2.64	2.72	2.73	2.78	2.80	2.76	2.72	2.56	2.55
Rubber	2.14	2.21	2.29	2.37	2.44	2.43	2.64	2.89	2.93	2.99	3.05	3.44	3.49
Milk (total)	351.52	349.10	354.68	370.04	378.48	387.51	395.14	394.34	396.15	399.50	407.66	414.13	424.43
Meat [3]	80.52	83.48	83.96	87.53	91.37	95.48	98.32	100.52	104.38	107.42	109.64	110.31	115.64
Eggs	16.02	16.40	16.95	17.42	17.96	19.22	19.74	20.55	21.45	22.14	22.23	22.43	22.79
FISHERY PRODUCTS [4]													
Freshwater and diadromous fish	6.09	6.57	7.58	8.55	9.18	8.96	9.27	9.80	11.29	11.88	12.18	12.55	12.80
Marine fish	34.04	34.92	39.54	39.64	42.99	45.95	48.66	47.22	52.71	52.35	47.02	46.95	50.35
Crustacea, molluscs and other invertebrates	3.77	4.15	3.90	4.17	4.30	4.54	4.97	4.76	4.94	4.89	5.21	5.18	5.28
Seals and miscellaneous aquatic mammals	—	—	—	—	0.01	—	—	0.01	0.01	0.01	0.01	0.01	0.01
Miscellaneous aquatic animals and residues	0.24	0.22	0.27	0.24	0.14	0.15	0.13	0.10	0.13	0.12	0.13	0.13	0.13
Aquatic plants	0.79	0.69	0.58	0.65	0.68	0.83	0.82	0.77	0.87	0.92	0.89	1.09	1.25
FOREST PRODUCTS													
Fuelwood [5]	1035	1060	1080	1090	1097	1096	1108	1115	1120	1137	1149	1148	1167
Industrial roundwood [5]	1038	1056	1113	1133	1153	1179	1205	1234	1276	1297	1306	1347	1314
Sawn softwood [5]	265.3	273.3	288.5	293.0	290.1	292.6	305.3	310.5	311.3	324.3	333.0	339.2	323.8
Sawn hardwood [5]	74.5	78.4	81.3	82.3	84.2	85.7	87.8	93.5	93.0	94.1	94.9	95.5	93.0
Plywood [5]	18.1	20.1	22.2	24.2	25.2	26.4	29.6	30.6	32.6	36.4	40.0	42.6	41.0
Particle board [5]	4.8	6.0	7.5	9.2	11.0	12.6	14.9	17.4	19.5	22.5	27.5	31.9	32.5
Fibreboard [5]	10.5	11.3	12.4	12.8	12.5	12.6	13.8	14.5	14.4	15.7	16.7	18.2	17.7
Mechanical wood pulp	19.1	19.7	20.9	21.8	22.9	22.5	23.9	25.6	26.4	26.4	27.4	28.4	29.5
Chemical wood pulp	46.2	50.3	54.8	57.9	62.3	64.5	70.3	75.1	78.0	78.2	84.2	88.7	91.5
Newsprint	14.5	14.9	16.2	17.0	18.3	18.5	19.3	20.8	21.5	21.1	21.8	22.1	22.8
Printing and writing paper	16.3	17.4	18.7	19.7	21.9	22.5	24.4	26.5	27.6	27.9	30.2	33.8	35.3
Other paper and paperboard	50.0	53.2	57.2	61.0	64.5	65.9	71.4	76.8	79.0	80.8	86.7	92.1	94.0

See notes at end of table.

ANNEX TABLE 1. — VOLUME OF PRODUCTION OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*continued*)

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	Million metric tons												
Western Europe													
AGRICULTURAL PRODUCTS													
Wheat	47.88	41.56	46.84	48.91	44.52	52.16	51.84	50.14	47.70	56.71	56.07	55.57	62.58
Barley	25.92	28.50	29.53	30.91	32.57	37.95	37.91	39.49	35.99	42.03	44.22	44.97	47.26
Oats	12.63	12.62	11.96	11.86	11.89	13.40	13.09	12.53	11.99	13.89	12.64	11.74	12.64
Rye	6.03	5.85	6.34	5.40	4.86	5.56	5.59	5.12	4.74	5.37	5.19	4.68	4.80
Maize	12.45	15.21	15.44	14.90	18.29	17.89	19.32	21.73	23.42	25.56	25.43	28.86	26.58
Sugar (centrifugal)	7.33	8.55	10.20	9.08	9.46	10.15	10.38	11.13	10.70	12.45	11.61	12.21	11.07
Potatoes	74.02	80.64	68.48	63.17	65.04	69.00	66.43	59.88	63.69	60.81	56.00	55.98	56.94
Apples	11.93	10.02	10.44	10.75	9.79	12.16	10.65	12.18	11.06	10.67	9.03	11.59	9.85
Citrus fruit	3.25	4.26	4.44	4.55	5.15	4.93	5.15	5.91	5.47	5.61	6.45	6.46	6.44
Olive oil	0.80	1.63	0.65	1.10	1.06	1.18	1.21	1.17	1.22	1.32	1.21	1.36	1.13
Rapeseed	0.53	0.41	0.65	0.77	0.61	0.94	1.02	0.98	1.08	1.29	1.46	1.45	1.63
Total vegetable oils and oilseeds (oil equivalent) [6]	1.20	2.03	1.12	1.59	1.53	1.74	1.82	1.82	1.89	2.16	2.08	2.33	2.12
Wine	19.97	16.72	19.74	19.44	18.34	18.83	18.62	17.60	20.53	17.62	17.95	23.76	22.87
Tobacco	0.26	0.34	0.38	0.37	0.33	0.37	0.32	0.29	0.32	0.30	0.33	0.35	0.32
Cotton (lint)	0.21	0.21	0.16	0.16	0.18	0.17	0.16	0.18	0.17	0.17	0.19	0.18	0.19
Milk (total)	110.70	110.18	110.34	114.04	116.64	119.27	122.19	119.11	117.69	117.43	121.47	123.28	126.08
Meat [3]	16.06	16.33	16.68	17.32	18.00	18.92	19.75	20.00	21.20	22.11	21.81	22.26	23.93
Eggs	3.55	3.70	3.91	3.82	3.96	4.06	4.20	4.42	4.61	4.64	4.75	4.77	4.81
FISHERY PRODUCTS [4]	8.24	8.50	9.17	10.25	10.91	11.30	11.01	10.41	10.99	10.99	11.22	11.37	11.37
FOREST PRODUCTS													
Fuelwood [5]	67.0	65.2	59.9	57.9	54.0	51.3	49.3	45.3	43.5	38.0	35.0	33.0	35.0
Coniferous logs [5]	70.5	66.9	75.1	76.0	74.5	75.1	74.9	80.0	85.2	86.7	72.0	81.0	82.0
Broadleaved logs [5]	20.5	21.2	22.5	23.0	23.7	23.6	23.2	24.2	25.6	23.4	23.0	24.0	24.0
Other industrial roundwood [5]	83.1	78.1	81.9	83.0	84.8	90.6	80.4	90.0	98.8	102.2	92.7	92.0	95.0
Sawn softwood [5]	39.8	39.1	42.1	42.0	41.3	41.9	43.3	46.0	47.5	49.1	49.4	53.0	52.1
Sawn hardwood [5]	9.1	9.4	10.2	10.6	10.8	10.9	11.1	11.5	11.7	12.2	12.0	12.4	12.9
Plywood [5]	2.2	2.5	2.6	2.6	2.6	2.7	2.8	3.1	3.1	3.3	3.7	3.8	3.5
Particle board [5]	2.8	3.5	4.3	5.1	5.8	6.6	7.8	9.3	10.7	12.5	14.4	16.8	17.6
Fibreboard [5]	2.8	2.9	3.2	3.2	3.0	3.0	3.1	3.2	3.2	3.2	3.4	3.5	3.4
Mechanical wood pulp	5.6	5.8	6.2	6.4	6.7	6.5	7.1	7.6	8.0	7.6	7.9	8.2	8.4
Chemical wood pulp	10.8	11.8	13.1	13.8	13.9	14.6	15.1	16.3	17.0	16.5	18.0	19.3	19.6
Newsprint	4.1	4.1	4.4	4.7	4.9	4.9	5.0	5.3	5.6	5.3	5.3	5.3	5.2
Printing and writing paper	4.8	5.3	5.7	6.0	6.7	7.1	8.1	9.0	9.6	9.6	10.5	11.8	12.7
Other paper and paperboard	12.7	13.9	14.8	15.5	15.9	16.1	17.5	19.2	19.8	19.7	20.8	22.8	23.6
Eastern Europe and U.S.S.R.													
AGRICULTURAL PRODUCTS													
Wheat	84.70	63.15	88.83	78.25	118.59	98.08	114.45	100.61	118.99	123.46	111.81	136.53	111.68
Rye	26.73	21.92	23.78	27.64	23.65	23.65	25.58	21.66	20.58	23.26	20.58	21.66	25.89
Barley	25.96	25.95	34.73	27.18	34.89	32.39	36.92	41.53	46.77	45.00	47.89	67.00	67.38
Oats	10.82	8.79	9.48	10.37	13.70	16.61	16.47	18.25	19.04	19.92	19.19	22.52	20.39
Millet and sorghum	2.89	1.96	3.62	2.31	3.27	3.36	2.77	3.43	2.20	2.14	2.21	4.54	3.04
Maize	25.86	23.27	26.82	19.34	23.32	22.27	22.26	27.61	23.21	24.55	29.17	30.12	29.64
Pulses	8.51	8.99	12.05	7.86	8.27	7.65	7.93	8.72	8.51	7.82	7.79	9.09	9.41
Cotton (lint)	1.51	1.78	1.82	1.96	2.09	2.07	2.01	1.93	2.37	2.37	2.38	2.49	2.73
Flax (fibre)	0.54	0.48	0.44	0.58	0.58	0.61	0.51	0.60	0.56	0.61	0.57	0.54	0.55
Sugar (centrifugal)	10.16	10.09	14.87	13.01	13.31	13.46	13.68	12.64	12.92	11.96	12.67	13.69	12.34
Total vegetable oils and oilseeds (oil equivalent) [6]	3.10	3.17	3.89	3.81	4.23	4.63	4.57	4.29	4.45	4.41	4.08	5.12	5.01
Sunflowerseed	5.74	5.27	7.04	6.46	7.36	7.90	7.99	7.79	7.45	7.09	6.55	8.77	8.04
Potatoes	130.91	141.52	167.15	152.14	159.11	169.23	177.53	155.38	169.30	152.57	149.75	181.04	152.53
Milk (total)	92.79	90.00	92.60	103.61	109.24	114.28	117.09	116.53	118.16	118.79	120.26	126.73	132.06
Meat [3]	14.45	15.03	13.41	15.47	16.41	17.50	17.93	18.06	18.60	19.88	20.89	21.26	22.92
Wool (greasy)	0.45	0.45	0.42	0.44	0.45	0.48	0.51	0.48	0.51	0.52	0.52	0.53	0.56
Eggs	2.62	2.51	2.49	2.69	2.85	3.03	3.13	3.26	3.54	3.86	3.98	4.20	4.45

See notes at end of table.

ANNEX TABLE 1. — VOLUME OF PRODUCTION OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*continued*)

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	Million metric tons												
FISHERY PRODUCTS [4]	4.02	4.47	5.05	5.73	6.01	6.54	6.94	7.40	8.24	8.41	8.87	9.82	10.57
FOREST PRODUCTS													
Fuelwood [5]	112.5	118.1	124.5	120.7	117.9	112.5	106.8	103.6	101.4	101.6	101.0	99.9	99.9
Coniferous logs [5]	171.3	173.0	178.1	145.5	144.4	154.7	156.2	157.9	166.6	166.5	167.5	173.0	176.0
Broadleaved logs [5]	34.1	34.4	35.5	30.4	30.6	32.5	33.1	33.7	34.5	35.6	35.7	35.6	35.6
Other industrial roundwood [5]	104.1	113.0	116.7	150.4	151.1	155.0	157.9	152.1	156.8	157.3	154.6	167.0	152.4
Sawn softwood [5]	104.3	105.1	111.4	111.7	108.5	110.2	111.3	113.1	116.5	119.1	119.3	119.5	118.9
Sawn hardwood [5]	20.6	21.1	19.1	19.0	18.8	19.3	19.5	19.8	20.4	20.8	20.8	20.9	20.9
Plywood [5]	2.2	2.2	2.4	2.4	2.5	2.6	2.6	2.8	2.9	2.7	2.9	3.0	3.0
Particle board [5]	0.9	1.2	1.5	1.8	3.0	2.7	3.1	3.4	3.8	4.4	4.9	5.6	5.9
Fibreboard [5]	1.2	1.4	1.5	1.7	1.8	2.0	2.2	2.3	2.5	2.6	2.8	3.3	3.6
Mechanical wood pulp	1.6	1.7	1.7	1.8	2.0	2.0	2.1	2.1	2.1	2.2	2.4	2.4	2.4
Chemical wood pulp	4.2	4.3	4.3	4.6	5.1	5.6	6.0	6.3	6.9	7.3	7.9	8.4	9.4
Newsprint	0.8	0.8	0.9	1.0	1.2	1.3	1.3	1.4	1.4	1.5	1.5	1.6	1.8
Printing and writing paper	1.4	1.4	1.5	1.5	1.6	1.8	1.9	1.9	1.9	2.0	2.1	2.5	2.8
Other paper and paperboard	4.2	4.4	4.7	5.2	5.7	6.0	6.4	6.7	7.3	7.7	8.0	8.1	9.1
North America													
AGRICULTURAL PRODUCTS													
Wheat	45.11	50.90	51.28	53.48	58.03	57.17	60.05	57.53	45.81	58.44	56.56	62.87	63.03
Barley	12.93	13.37	12.07	13.31	15.10	13.64	16.38	17.38	17.95	23.19	20.51	19.40	15.29
Oats	22.29	20.89	17.72	19.66	17.44	16.18	19.30	19.49	18.76	18.40	14.67	14.72	12.94
Maize	92.45	103.01	89.85	105.13	107.55	125.34	115.10	120.94	108.10	146.24	144.10	146.24	120.73
Sorghum	12.96	14.87	12.44	17.09	18.16	19.20	18.58	18.54	17.36	22.25	20.56	23.62	15.95
Rice (milled equivalent) [1]	1.95	2.07	2.16	2.25	2.51	2.64	3.07	2.71	2.47	2.53	2.52	2.74	3.36
Sugar (centrifugal)	4.28	5.04	5.25	4.87	4.94	4.93	5.51	5.20	5.38	5.58	5.90	5.33	5.14
Potatoes	14.15	14.40	13.10	15.30	16.42	15.65	15.81	16.54	17.09	16.72	15.43	15.76	17.87
Apples	2.99	3.08	3.28	3.17	2.99	2.89	2.88	3.51	3.24	3.16	3.06	3.21	3.31
Citrus fruit	7.89	5.95	5.67	6.95	7.96	10.37	7.56	10.18	10.31	10.83	11.05	12.61	12.15
Soybeans	18.39	19.16	19.27	23.23	25.52	26.78	30.37	31.05	30.96	32.29	34.96	42.50	33.87
Cottonseed	5.57	5.62	5.66	5.52	3.59	2.91	4.21	3.69	3.69	3.85	4.89	4.49	4.23
Total vegetable oils and oilseeds (oil equivalent) [6]	5.01	5.25	5.48	6.52	6.51	6.50	7.55	7.85	8.34	8.57	8.94	10.35	8.56
Tobacco	1.14	1.15	1.08	0.92	0.96	0.99	0.88	0.93	0.97	0.87	0.88	0.91	1.01
Cotton (lint)	3.24	3.34	3.31	3.26	2.09	1.62	2.38	2.18	2.22	2.28	2.98	2.82	2.55
Milk (total)	65.61	65.16	65.99	64.66	62.73	62.14	61.51	61.27	61.37	61.70	62.41	60.00	59.92
Meat [3]	18.84	19.81	21.06	20.92	21.94	22.99	23.39	23.69	24.70	25.59	25.51	24.46	25.78
Eggs	4.12	4.07	4.15	4.17	4.21	4.43	4.40	4.40	4.48	4.56	4.44	4.24	4.21
FISHERY PRODUCTS [4]	4.10	3.97	3.83	3.96	3.89	3.73	3.95	3.87	4.17	4.11	3.82	3.83	3.77
FOREST PRODUCTS													
Fuelwood [5]	39.4	36.5	37.6	36.8	34.8	26.8	26.0	24.9	19.4	17.9	17.2	16.8	16.8
Coniferous logs [5]	193.5	196.8	208.8	212.5	216.5	214.8	233.7	227.8	227.7	246.1	266.0	266.0	240.0
Broadleaved logs [5]	35.7	38.7	39.8	41.7	41.7	39.7	38.1	38.8	38.9	38.4	40.5	42.0	40.0
Other industrial roundwood [5]	124.3	119.7	127.9	135.2	145.1	142.5	145.2	161.1	163.3	151.5	154.7	160.0	159.0
Sawn softwood [5]	82.5	87.8	91.0	93.1	91.6	89.1	96.5	95.3	90.0	99.4	106.0	107.4	95.8
Sawn hardwood [5]	15.8	17.0	18.4	18.9	19.4	18.9	18.4	21.4	17.9	17.6	17.4	18.9	16.3
Plywood [5]	10.6	11.9	13.1	14.5	14.8	14.9	16.5	15.6	16.0	18.3	20.0	20.5	20.2
Particle board [5]	0.8	0.9	1.2	1.6	2.2	2.4	2.9	3.4	3.4	4.8	6.1	6.9	5.9
Fibreboard [5]	5.5	5.8	6.3	6.4	6.1	6.2	7.0	7.3	6.8	7.9	8.5	9.1	8.6
Mechanical wood pulp	9.9	10.1	10.8	11.1	11.8	11.4	12.1	13.0	13.1	13.7	13.8	14.2	15.0
Chemical wood pulp	26.4	28.5	31.3	33.0	35.9	36.3	40.3	42.7	43.0	43.1	46.1	47.6	48.3
Newsprint	8.0	8.0	8.7	9.0	9.9	9.8	10.1	11.1	11.0	10.7	11.2	11.2	11.6
Printing and writing paper	7.3	7.6	8.1	8.8	9.8	9.7	10.3	10.9	10.8	11.1	12.0	13.2	13.1
Other paper and paperboard	25.1	26.2	28.0	29.9	31.6	31.4	34.1	36.0	35.5	36.5	39.7	40.6	40.6

See notes at end of table

ANNEX TABLE 1. — VOLUME OF PRODUCTION OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*continued*)

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	Million metric tons												
Oceania													
AGRICULTURAL PRODUCTS													
Wheat	8.57	9.17	10.31	7.32	12.99	7.89	15.25	11.00	8.18	8.83	6.82	12.49	11.45
Sugar (centrifugal)	1.88	1.75	1.98	1.98	2.38	2.37	2.77	2.21	2.51	2.79	2.84	2.53	2.85
Wool (greasy)	1.05	1.04	1.09	1.12	1.08	1.13	1.13	1.21	1.26	1.22	1.20	1.04	0.99
Milk (total)	12.15	12.31	12.66	13.14	13.26	13.75	13.18	13.61	13.48	13.19	13.20	13.05	12.53
Meat[3]	2.41	2.53	2.63	2.64	2.61	2.62	2.82	2.92	3.10	3.23	3.55	3.63	3.15
FISHERY PRODUCTS[4]	0.11	0.11	0.12	0.13	0.14	0.15	0.16	0.14	0.16	0.18	0.18	0.19	0.19
FOREST PRODUCTS													
Fuelwood[5]	7.6	7.5	7.5	7.4	7.4	7.3	7.3	7.3	7.2	7.4	7.4	7.4	7.4
Industrial roundwood[5]	15.0	16.0	17.3	17.6	18.1	18.2	19.0	19.8	20.3	20.9	21.5	20.9	21.0
Sawn softwood[5]	2.1	2.2	2.5	2.5	2.5	2.3	2.4	2.5	2.6	2.4	2.6	2.6	2.6
Sawn hardwood[5]	2.4	2.5	2.6	2.8	2.7	2.6	2.8	2.6	2.7	2.8	2.8	2.5	2.5
Particle board[5]	0.02	0.04	0.06	0.10	0.15	0.18	0.23	0.27	0.32	0.34	0.33	0.41	0.50
Mechanical wood pulp	0.31	0.38	0.42	0.46	0.43	0.44	0.46	0.53	0.61	0.59	0.60	0.70	0.70
Chemical wood pulp	0.33	0.38	0.41	0.44	0.49	0.54	0.54	0.67	0.69	0.71	0.80	0.80	0.90
Newsprint	0.21	0.26	0.28	0.29	0.28	0.30	0.30	0.33	0.39	0.40	0.39	0.39	0.40
Paper and paperboard other than newsprint	0.49	0.55	0.59	0.69	0.71	0.77	0.78	0.89	0.97	0.99	1.1	1.3	1.4
Latin America													
AGRICULTURAL PRODUCTS													
Wheat	9.75	12.80	15.61	10.47	10.55	11.74	10.47	12.38	11.01	11.78	12.31	12.10	12.99
Maize	25.55	26.10	27.93	31.08	32.69	34.96	33.60	33.21	38.07	39.11	35.18	37.51	38.86
Rice (milled equivalent)[1]	5.50	5.48	6.07	7.01	5.90	6.72	6.72	6.60	7.62	7.10	7.13	7.66	7.71
Sugar (centrifugal)	16.05	15.70	16.92	20.13	17.99	20.07	18.62	18.53	22.57	21.86	21.44	23.73	25.37
Citrus fruit	5.87	6.22	6.29	6.66	7.31	7.53	8.05	8.65	8.87	9.57	8.83	8.86	9.85
Bananas	12.28	12.84	13.93	14.75	15.01	15.81	15.90	17.03	18.01	19.79	19.92	19.95	19.87
Groundnuts	1.29	1.11	1.02	1.37	1.52	1.29	1.23	1.18	1.39	1.60	1.43	1.23	0.99
Cottonseed	2.86	2.75	2.86	3.01	2.90	2.53	3.01	3.04	2.82	2.52	3.00	3.01	3.23
Sunflowerseed	0.97	0.59	0.57	0.84	0.94	1.23	1.03	0.97	1.22	0.90	0.91	0.97	10.3
Copra	0.25	0.25	0.25	0.25	0.24	0.26	0.28	0.22	0.23	0.24	0.24	0.23	0.23
Palm kernels	0.18	0.20	0.21	0.24	0.24	0.25	0.25	0.26	0.30	0.29	0.30	0.31	0.31
Total vegetable oils and oilseeds (oil equivalent)[7]	2.12	2.05	2.10	2.31	2.39	2.38	2.41	2.54	2.79	2.64	2.99	3.26	3.87
Coffee	3.46	2.96	2.32	3.62	2.54	2.88	2.41	2.64	2.21	3.26	2.99	2.35	3.12
Cocoa	0.32	0.32	0.32	0.33	0.33	0.37	0.36	0.38	0.38	0.41	0.38	0.37	0.39
Tobacco	0.48	0.53	0.50	0.53	0.50	0.52	0.55	0.54	0.55	0.53	0.59	0.57	0.61
Cotton (lint)	1.59	1.53	1.60	1.69	1.63	1.42	1.68	1.68	1.55	1.40	1.66	1.66	1.76
Sisal	0.23	0.24	0.24	0.26	0.26	0.25	0.24	0.27	0.27	0.27	0.29	0.33	0.37
Wool (greasy)	0.33	0.35	0.35	0.34	0.37	0.36	0.35	0.35	0.34	0.32	0.31	0.30	0.30
Milk (total)	18.72	19.33	20.49	21.24	22.14	22.19	23.21	23.93	24.06	26.04	26.23	26.05	27.37
Meat[3]	8.17	8.61	8.33	8.58	9.01	9.39	9.88	10.56	10.58	9.95	10.56	10.65	11.26
Eggs	0.98	1.02	1.06	1.15	1.25	1.31	1.36	1.46	1.53	1.63	1.65	1.69	1.75
FISHERY PRODUCTS[4]	8.75	8.90	11.67	9.64	11.64	12.82	13.66	11.96	15.53	14.01	7.64	5.23	7.45
FOREST PRODUCTS													
Fuelwood[5]	193.5	204.6	209.1	209.8	215.9	216.2	221.3	221.4	221.8	226.0	227.0	225.0	225.0
Industrial roundwood[5]	36.2	34.5	36.4	37.9	39.6	40.4	43.7	45.5	50.4	52.0	52.0	53.0	54.0
Sawn softwood[5]	5.3	5.0	5.5	5.7	6.2	6.2	6.6	7.0	7.3	7.4	7.6	7.8	8.0
Sawn hardwood[5]	6.6	6.4	6.8	6.7	7.1	7.2	7.4	7.8	8.6	8.3	8.0	8.1	8.0
Plywood[5]	0.37	0.37	0.38	0.39	0.40	0.44	0.49	0.53	0.67	0.84	1.70	1.11	1.11
Particle board[5]	0.07	0.10	0.14	0.16	0.19	0.21	0.30	0.38	0.59	0.63	0.68	0.71	0.72
All wood pulp	0.75	0.86	0.94	1.09	1.31	1.34	1.46	1.52	1.72	1.80	1.98	2.20	2.40
All paper and paperboard	1.90	2.01	2.30	2.60	2.80	2.90	3.10	3.40	3.80	4.00	4.20	4.70	5.30

See notes at end of table.

ANNEX TABLE 1. – VOLUME OF PRODUCTION OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*continued*)

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	Million metric tons												
Far East[8]													
AGRICULTURAL PRODUCTS													
Wheat	16.61	15.44	14.60	17.43	14.96	16.37	23.67	26.04	28.20	31.04	33.94	32.75	30.29
Maize	11.50	10.86	12.51	11.39	13.01	13.55	13.94	13.56	16.26	13.92	13.72	15.16	14.74
Millet and sorghum	18.56	17.99	19.20	15.19	17.83	20.02	17.98	19.83	21.35	18.00	15.34	21.19	18.09
Rice (milled equivalent)[1]	76.06	82.39	85.66	76.24	76.27	84.42	89.39	93.69	97.30	97.39	91.15	104.19	99.51
Sugar (centrifugal)	5.47	5.05	5.63	6.51	6.73	5.34	5.30	7.11	8.60	8.37	7.81	8.77	9.47
Sugar (non-centrifugal)	7.84	8.24	8.58	9.46	9.34	8.67	8.48	9.79	9.77	9.71	8.97	9.46	10.83
Pulses[9]	13.42	13.36	12.07	13.92	11.52	10.54	13.76	12.39	13.88	13.30	12.70	12.65	11.34
Soybeans	0.65	0.57	0.61	0.62	0.64	0.70	0.73	0.69	0.80	0.83	0.85	0.91	0.95
Groundnuts	6.23	6.23	9.02	5.21	5.50	6.86	5.86	6.41	7.47	7.57	5.33	7.17	6.41
Copra	2.46	2.97	2.79	2.79	3.01	2.67	2.81	2.76	2.91	3.19	3.70	3.09	2.92
Total vegetable oils and oilseeds (oil equivalent)[10]	5.64	5.96	5.97	5.60	5.77	6.14	6.17	6.27	7.01	7.71	7.22	7.69	7.66
Tea	0.70	0.70	0.74	0.75	0.75	0.75	0.78	0.76	0.77	0.77	0.80	0.83	0.86
Tobacco	0.73	0.74	0.74	0.75	0.74	0.83	0.89	0.88	0.83	0.83	0.99	0.93	0.99
Cotton (lint)	1.48	1.60	1.50	1.46	1.52	1.72	1.65	1.64	1.56	2.00	1.91	1.86	1.90
Jute[2]	2.66	2.81	2.76	2.86	3.08	3.15	2.18	3.05	2.85	2.58	2.90	3.33	2.54
Rubber (natural)	1.94	2.01	2.08	2.16	2.23	2.23	2.42	2.66	2.69	2.73	2.79	3.16	3.20
Milk (total)	26.37	26.49	26.52	26.41	26.17	26.85	27.47	28.60	29.65	30.71	31.79	32.94	33.53
Meat[3]	2.78	2.87	3.03	3.14	3.28	3.31	3.33	3.45	3.60	3.71	3.79	3.95	4.03
Eggs	0.55	0.58	0.62	0.66	0.68	0.70	0.76	0.85	0.87	0.72	0.86	0.89	0.91
FISHERY PRODUCTS[4]	4.74	5.20	5.87	6.11	6.59	6.95	7.70	8.16	8.43	8.99	9.38	10.36	10.05
FOREST PRODUCTS													
Fuelwood[5]	249.1	253.7	261.1	267.4	274.2	280.9	288.9	295.1	302.0	318.7	327.1	331.5	343.5
Industrial roundwood[5]	38.6	43.9	46.0	49.6	50.8	55.3	61.2	64.1	66.5	68.7	77.0	94.0	96.0
Sawn softwood[5]	0.9	1.1	1.3	1.4	1.2	1.3	1.4	1.4	1.4	1.6	1.7	1.7	1.7
Sawn hardwood[5]	8.5	9.4	9.8	10.1	10.5	11.7	11.2	12.3	12.7	12.0	13.1	13.2	13.2
Plywood[5]	0.4	0.5	0.5	0.7	0.8	1.0	1.4	1.5	1.6	1.8	2.5	3.0	3.1
All wood pulp	0.08	0.11	0.12	0.15	0.16	0.16	0.21	0.23	0.25	0.25	0.30	0.40	0.46
All paper and paperboard	0.87	0.96	1.05	1.16	1.23	1.12	1.23	1.39	1.51	1.62	1.82	1.91	1.98
China and other Asian centrally planned countries													
AGRICULTURAL PRODUCTS													
Wheat	21.62	22.19	25.94	26.40	26.04	28.40	27.30	28.72	31.38	32.95	34.80	36.47	37.40
Maize	23.67	24.41	25.50	27.11	27.24	27.78	27.78	29.08	30.97	32.09	30.63	32.47	33.34
Millet and sorghum	16.85	17.54	18.16	19.37	19.38	19.69	19.70	20.62	22.42	23.44	22.96	23.48	23.99
Rice (milled equivalent)[1]	58.83	58.93	61.85	64.72	64.04	66.47	65.52	68.08	73.21	75.36	73.19	77.58	79.93
Sugar (centrifugal)	1.98	2.12	2.71	3.19	3.33	3.22	3.42	3.56	3.66	3.97	4.04	4.12	4.30
Sugar (non-centrifugal)	0.29	0.28	0 61	0.68	0.70	0.71	0.78	0.79	0.79	0.79	0.79	0.80	0.87
Pulses[9]	7.24	7.51	7.84	7.83	7.84	7.85	7.77	8.18	8.29	8.49	8.60	8.68	8.74
Soybeans	10.45	10.65	11.44	11.25	11.26	11.42	11.00	11.23	11.89	11.99	11.49	12.03	12.14
Groundnuts	1.77	2.03	2.45	2.47	2.52	2.48	2.30	2.50	2.82	2.72	2.54	2.75	2.75
Total vegetable oils and oilseeds (oil equivalent)[11]	3.33	3.70	4.12	4.17	4.32	4.35	4.15	4.17	4.54	4.58	4.31	4.67	4.72
Tea	0.18	0.18	0.18	0.18	0.18	0.20	0.22	0.23	0.25	0.26	0.29	0.31	0.32
Tobacco	0.66	0.78	0.83	0.84	0.85	0.91	0.91	0.84	0.85	0.85	0.90	1.01	1.03
Cotton (lint)	1.00	1.15	1.50	1.65	1.85	1.94	1.81	1.76	2.00	2.09	1.78	2.15	2.15
Jute[2]	0.33	0.38	0.43	0.47	0.50	0.52	0.53	0.53	0.59	0.62	0.64	0.71	0.73
Milk (total)	4.55	4.62	4.70	4.76	4.80	4.85	4.90	4.96	5.19	5.25	5.38	5.43	5.50
Meat[3]	12.17	12.55	12.82	13.17	13.49	13.88	14.15	14.37	14.68	14.90	15.29	15.70	15.97
Eggs	2.59	2.87	2.88	3.01	2.98	3.34	3.39	3.44	3.47	3.52	3.52	3.56	3.71
FISHERY PRODUCTS[4]	4.93	5.44	6.24	6.82	7.16	6.75	7.03	7.20	7.97	8.63	8.67	8.74	8.74

See notes at end of table.

ANNEX TABLE 1. — VOLUME OF PRODUCTION OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*concluded*)

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
Near East [12]	*Million metric tons*												
AGRICULTURAL PRODUCTS													
Wheat	18.12	18.16	17.35	18.61	19.52	20.90	20.55	21.27	20.27	23.11	26.03	21.36	24.09
Barley	7.09	7.48	6.12	6.74	6.73	7.19	7.05	7.39	6.00	6.41	7.32	5.24	6.36
Maize	3.57	3.64	3.73	3.87	4.16	4.07	4.15	4.24	4.20	4.24	4.33	4.53	4.63
Rice (milled equivalent) [1]	2.34	2.45	2.40	2.34	2.28	2.80	3.08	2.97	3.11	2.84	2.98	2.92	3.09
Sugar (centrifugal)	0.94	1.09	1.41	1.24	1.45	1.74	1.77	1.76	1.94	2.38	2.24	2.19	2.35
Pulses [9]	1.55	1.46	1.67	1.69	1.55	1.55	1.50	1.66	1.49	1.58	1.81	1.52	1.74
Citrus fruit	1.18	1.32	1.31	1.48	1.70	1.90	1.98	2.08	2.10	2.50	2.73	2.86	2.82
Dates	1.52	1.49	1.32	1.38	1.40	1.34	1.27	1.44	1.49	1.53	1.52	1.57	1.59
Olive oil	0.08	0.15	0.18	0.11	0.21	0.15	0.22	0.10	0.16	0.09	0.25	0.10	0.21
Cottonseed	2.16	2.17	2.24	2.44	2.25	2.25	2.44	2.63	2.60	2.81	3.01	2.83	2.93
Total vegetable oils and oilseeds (oil equivalent) [6]	0.72	0.90	0.95	0.88	0.96	0.94	1.01	1.04	1.15	1.17	1.48	1.23	1.52
Tobacco	0.13	0.16	0.25	0.19	0.21	0.24	0.21	0.20	0.20	0.23	0.24	0.18	0.26
Cotton (lint)	1.20	1.19	1.27	1.37	1.29	1.30	1.41	1.52	1.49	1.63	1.72	1.61	1.68
Wool (greasy)	0.12	0.12	0.12	0.13	0.13	0.13	0.14	0.15	0.14	0.14	0.15	0.14	0.17
Milk (total)	10.09	10.17	10.44	10.72	11.16	11.36	11.92	11.91	11.77	11.89	12.22	12.18	12.51
Meat [3]	1.62	1.64	1.66	1.75	1.83	1.88	1.99	2.06	2.10	2.13	2.18	2.22	2.28
FISHERY PRODUCTS [4]	0.43	0.49	0.52	0.50	0.49	0.55	0.51	0.57	0.62	0.61	0.61	0.71	0.72
FOREST PRODUCTS													
Fuelwood [5]	31.0	33.2	35.0	37.6	37.7	38.0	38.7	40.3	39.1	38.6	38.9	36.5	36.5
Industrial roundwood [5]	9.1	9.9	10.7	11.1	11.2	11.5	12.1	12.8	13.1	13.1	14.1	14.5	14.0
Sawn softwood [5]	1.0	1.1	1.2	1.3	1.7	1.8	2.0	2.2	2.2	2.1	2.2	2.3	2.4
Sawn hardwood [5]	0.4	0.4	0.4	0.5	0.5	0.6	0.6	0.6	0.7	0.8	0.7	0.7	0.8
Plywood [5]	0.05	0.06	0.06	0.07	0.09	0.10	0.10	0.11	0.11	0.12	0.12	0.11	0.11
All wood pulp	0.07	0.07	0.08	0.08	0.08	0.08	0.08	0.08	0.10	0.18	0.24	0.30	0.30
All paper and paperboard	0.18	0.20	0.22	0.22	0.23	0.26	0.28	0.29	0.34	0.42	0.48	0.59	0.64
Africa [13]													
AGRICULTURAL PRODUCTS													
Wheat	4.27	4.61	4.04	4.61	3.28	4.07	5.98	4.45	4.94	5.35	6.14	4.82	4.64
Barley	3.66	4.05	3.18	3.38	2.82	3.39	5.64	4.26	4.23	4.64	5.05	3.40	4.57
Maize	8.55	8.87	9.53	9.77	10.59	11.07	10.88	11.50	11.04	11.12	12.82	11.06	13.16
Millet and sorghum	15.54	15.35	15.50	15.73	13.54	15.14	14.35	16.38	15.89	15.22	14.74	13.07	14.57
Rice (milled equivalent) [1]	2.39	2.39	2.56	2.44	2.61	2.88	2.84	2.93	2.97	3.16	2.89	2.96	3.37
Sugar (centrifugal)	1.54	1.87	1.74	2.02	2.09	2.17	2.28	2.47	2.54	2.76	2.83	3.05	2.99
Pulses [9]	3.12	3.45	3.31	3.44	3.52	3.47	3.85	4.10	4.40	4.43	4.74	4.24	4.32
Citrus fruit	1.38	1.44	1.66	1.53	1.65	1.72	1.94	2.02	2.12	2.22	2.22	2.32	2.36
Bananas	1.83	1.94	1.90	1.88	1.88	2.01	1.99	2.26	3.70	3.77	3.71	3.88	4.00
Olive oil	0.09	0.15	0.15	0.11	0.06	0.16	0.14	0.08	0.21	0.22	0.14	0.20	0.16
Groundnuts	4.42	4.86	4.70	5.10	4.63	4.73	4.77	4.92	4.42	4.93	3.86	3.31	3.95
Total vegetable oils and oilseeds (oil equivalent) [7]	3.11	3.44	3.39	3.52	3.27	3.09	3.29	3.37	3.56	3.79	3.33	3.17	3.45
Coffee	0.98	1.06	1.09	1.14	1.06	1.24	1.11	1.32	1.28	1.29	1.33	1.37	1.39
Cocoa	0.86	0.90	1.20	0.86	0.97	0.98	0.84	1.00	1.09	1.16	1.02	0.94	1.03
Wine	1.60	1.72	1.48	1.93	1.02	0.88	1.27	1.03	1.05	1.15	1.05	0.95	0.96
Tobacco	0.18	0.16	0.23	0.22	0.20	0.18	0.15	0.15	0.16	0.18	0.19	0.18	0.21
Cotton (lint)	0.32	0.31	0.34	0.35	0.42	0.40	0.46	0.58	0.52	0.52	0.57	0.54	0.54
Sisal	0.40	0.41	0.44	0.42	0.41	0.39	0.38	0.39	0.37	0.34	0.33	0.32	0.37
Rubber (natural)	0.16	0.16	0.17	0.16	0.18	0.16	0.18	0.18	0.20	0.22	0.22	0.24	0.25
Wool (greasy)	0.04	0.04	0.03	0.04	0.04	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05
Milk (total)	5.19	5.24	5.39	5.52	5.91	6.13	6.33	6.54	6.62	6.54	6.26	6.05	6.27
Meat [3]	2.69	2.71	2.77	2.86	2.98	3.12	3.17	3.29	3.38	3.29	3.19	3.17	3.19
Eggs	0.29	0.29	0.31	0.32	0.33	0.35	0.36	0.38	0.39	0.40	0.41	0.42	0.43
FISHERY PRODUCTS [4]	1.47	1.50	1.80	1.81	2.03	2.08	2.08	2.33	2.78	2.86	3.38	3.37	3.43
FOREST PRODUCTS													
Fuelwood [5]	194.6	199.4	203.2	208.0	209.9	216.4	221.5	227.2	233.9	239.0	244.0	245.0	250.0
Industrial roundwood [5]	19.5	21.1	21.9	22.9	23.5	24.2	25.6	28.3	29.0	31.0	32.0	33.0	31.0
Sawn softwood [5]	0.25	0.23	0.25	0.27	0.27	0.32	0.32	0.34	0.42	0.46	0.46	0.47	0.48
Sawn hardwood [5]	1.7	1.7	1.8	2.0	2.0	2.0	2.2	2.5	2.6	2.7	2.6	2.7	2.3
Plywood [5]	0.14	0.17	0.18	0.20	0.16	0.18	0.19	0.23	0.25	0.27	0.34	0.36	0.36
Total wood pulp	0.04	0.12	0.15	0.15	0.15	0.15	0.16	0.18	0.19	0.20	0.22	0.25	0.28
Total paper and paperboard	0.08	0.09	0.10	0.10	0.10	0.13	0.14	0.16	0.17	0.19	0.20	0.19	0.21

[1] Paddy converted at 65%. — [2] Including allied fibres. — [3] Beef and veal, mutton and lamb, pork, poultry meat, horse meat, game meat, meat n.e.s. — [4] Nominal catch (live weight) excluding whales — [5] Million cubic metres. — [6] Olive oil, soybeans, groundnuts, cottonseed, sesame seed, sunflowerseed, rapeseed, linseed, hempseed, castor beans. — [7] Olive oil, palm oil, soybeans, groundnuts, cottonseed, sesame seed, sunflowerseed, rapeseed, copra, palm kernels, linseed, hempseed, castor beans. — [8] Excluding China and other Asian centrally planned countries, and Japan. — [9] Dry beans, dry peas, broad beans, chick-peas, lentils. — [10] Palm oil, soybeans, groundnuts, cottonseed, sesame seed, rapeseed, copra, palm kernels, linseed, castor beans. — [11] Soybeans, groundnuts, coconuts, palm kernels, castor beans, sunflowerseed, rapeseed, tung nuts, sesame seed, cottonseed, linseed, palm oil. — [12] Excluding Israel. — [13] Excluding South Africa.

ANNEX TABLE 2. — INDICES OF FOOD AND AGRICULTURAL PRODUCTION, BY COUNTRIES, 1970 TO 1974

Region and country	Total						Per caput					
	1970	1971	1972	1973	1974	Change 1973 to 1974	1970	1971	1972	1973	1974	Change 1973 to 1974
	..... 1961-65 average = 100					Percent	..... 1961-65 average = 100					Percent
WESTERN EUROPE												
Food production												
EUROPEAN ECONOMIC COMMUNITY												
Belgium	119	128	122	123	128	+ 4	114	123	117	117	121	+ 4
Denmark	94	98	96	99	108	+ 9	89	93	90	92	100	+ 8
France	116	122	122	129	133	+ 3	109	113	112	118	120	+ 2
Germany, Fed. Rep. of	116	121	115	119	122	+ 2	109	114	108	111	113	+ 2
Ireland	115	128	121	121	133	+10	111	122	114	114	124	+ 9
Italy	120	119	113	122	122	—	114	113	106	114	112	— 1
Luxembourg	104	105	103	110	115	+ 5	99	99	97	103	106	+ 4
Netherlands	129	138	133	140	147	+ 5	118	125	119	124	130	+ 4
United Kingdom	116	120	121	124	131	+ 5	112	116	116	119	125	+ 5
OTHER WESTERN EUROPE												
Austria	110	112	109	115	119	+ 4	107	103	104	109	113	+ 3
Finland	111	119	118	109	111	+ 2	109	116	115	106	107	+ 1
Greece	142	145	150	154	165	+ 7	137	139	143	147	157	+ 6
Iceland	101	100	107	113	115	+ 2	91	90	95	99	100	+ 1
Malta	142	144	146	152	151	— 1	142	144	147	153	150	— 2
Norway	104	106	109	110	124	+13	98	100	101	102	114	+12
Portugal	110	102	102	108	107	— 1	103	95	94	99	98	— 1
Spain	125	129	132	142	151	+ 6	116	119	120	128	135	+ 5
Sweden	104	106	108	102	124	+22	99	100	101	95	116	+22
Switzerland	107	114	111	122	123	+ 1	99	104	99	108	108	+ 1
Yugoslavia	116	129	128	135	149	+10	109	119	117	123	134	+ 9
REGIONAL	117	121	119	125	130	+ 4	110	114	111	116	120	+ 3
Agricultural production												
EUROPEAN ECONOMIC COMMUNITY												
Belgium	117	126	120	121	126	+ 4	112	122	115	115	119	+ 4
Denmark	94	98	96	99	108	+ 9	89	93	90	92	100	+ 8
France	116	121	121	128	132	+ 3	108	113	112	117	120	+ 2
Germany, Fed. Rep. of	116	121	115	119	122	+ 2	108	114	108	111	113	+ 2
Ireland	115	127	120	120	132	+10	111	122	114	113	123	+ 9
Italy	120	119	113	122	122	—	114	113	106	114	112	— 1
Luxembourg	104	105	103	110	115	+ 5	99	99	97	103	106	+ 4
Netherlands	128	137	132	138	145	+ 5	117	124	118	123	128	+ 4
United Kingdom	116	120	121	124	130	+ 5	112	115	115	118	124	+ 5
OTHER WESTERN EUROPE												
Austria	110	112	109	115	119	+ 4	107	108	104	109	113	+ 3
Finland	111	119	118	109	111	+ 2	109	116	115	106	107	+ 1
Greece	135	138	142	146	153	+ 5	130	132	136	140	145	+ 4
Iceland	97	97	103	109	111	+ 2	88	87	92	96	97	+ 1
Malta	142	144	146	152	151	— 1	142	144	147	153	150	— 2
Norway	103	106	108	110	124	+13	98	99	101	101	113	+12
Portugal	123	127	130	139	148	+ 6	114	117	118	125	132	+ 5
Spain	109	102	101	107	107	— 1	103	95	93	98	97	— 2
Sweden	104	106	108	101	124	+22	98	100	101	95	116	+22
Switzerland	107	114	111	122	123	+ 1	99	104	99	108	108	+ 1
Yugoslavia	115	127	127	134	146	+ 9	108	117	116	122	132	+ 8
REGIONAL	116	121	119	125	130	+ 4	110	114	111	115	119	+ 3

ANNEX TABLE 2. — INDICES OF FOOD AND AGRICULTURAL PRODUCTION, BY COUNTRIES, 1970 TO 1974 (*continued*)

Region and country	Total						Per caput					
	1970	1971	1972	1973	1974	Change 1973 to 1974	1970	1971	1972	1973	1974	Change 1973 to 1974
	..... *1961-65 average = 100*					*Percent*	..... *1961-65 average = 100*					*Percent*
EASTERN EUROPE AND THE U.S.S.R.												
Food production												
Eastern Europe	118	124	134	138	144	+ 4	112	117	126	130	134	+ 3
U.S.S.R.	135	136	132	153	147	— 4	125	125	120	138	132	— 5
REGIONAL	130	132	133	148	146	— 1	121	122	122	135	132	— 2
Agricultural production												
Eastern Europe	117	124	134	138	143	+ 4	112	117	126	129	133	+ 3
U.S.S.R.	135	136	132	152	147	— 3	125	125	120	137	131	— 4
REGIONAL	129	132	133	147	146	— 1	121	122	122	134	132	— 2
NORTH AMERICA												
Food production												
Canada	106	122	113	115	108	— 6	94	107	98	99	92	— 8
United States	114	124	123	125	126	—	105	114	111	113	112	—
REGIONAL	113	124	122	124	124	—	104	113	110	111	110	— 1
Agricultural production												
Canada	106	122	113	116	109	— 6	95	107	98	100	92	— 7
United States	109	118	118	120	120	—	101	108	107	108	107	— 1
REGIONAL	109	119	118	120	119	—	100	108	106	107	106	— 1
OCEANIA												
Food production												
Australia	121	129	127	145	143	— 2	106	111	107	121	118	— 3
New Zealand	118	120	124	124	119	— 3	107	107	108	106	100	— 5
REGIONAL	121	127	126	140	137	— 2	106	109	107	117	113	— 3
Agricultural production												
Australia	121	125	123	130	127	— 2	106	107	104	109	105	— 4
New Zealand	118	119	120	118	113	— 5	106	106	105	101	94	— 7
REGIONAL	120	123	122	127	123	— 3	106	107	104	107	102	— 4

ANNEX TABLE 2. — INDICES OF FOOD AND AGRICULTURAL PRODUCTION, BY COUNTRIES, 1970 TO 1974 (*continued*)

Region and country	Total						Per caput					
	1970	1971	1972	1973	1974	Change 1973 to 1974	1970	1971	1972	1973	1974	Change 1973 to 1974
	..... *1961-65 average = 100*					*Percent*	..... *1961-65 average = 100*					*Percent*
LATIN AMERICA												
Food production												
CENTRAL AMERICA												
Costa Rica	156	165	176	174	175	+ 1	124	127	133	128	125	— 2
El Salvador	126	138	128	142	147	+ 4	100	106	96	102	102	—
Guatemala	131	137	141	144	144	—	107	109	109	108	105	— 3
Honduras	143	162	159	174	156	—10	114	124	117	124	108	—13
Mexico	132	141	138	140	143	+ 2	104	107	101	100	98	— 1
Nicaragua	137	144	139	142	142	—	112	114	107	105	102	— 3
Panama	141	152	152	153	160	+ 4	112	117	114	111	111	+ 1
CARIBBEAN												
Barbados	101	92	77	87	83	4	101	91	76	86	82	— 5
Cuba	132	116	104	112	120	+ 6	114	99	86	92	97	+ 5
Dominican Republic	129	138	146	146	151	+ 4	102	105	108	104	104	—
Haiti	109	114	117	120	122	+ 2	93	94	94	94	93	— 1
Jamaica	104	112	109	108	114	+ 6	89	94	89	87	90	+ 4
SOUTH AMERICA												
Argentina	114	108	110	113	118	+ 4	102	96	96	98	100	+ 2
Bolivia	129	135	139	145	152	+ 5	110	112	112	114	117	+ 2
Brazil	128	133	140	138	151	+ 9	105	106	109	104	111	+ 6
Chile	118	119	116	96	120	+25	101	100	95	78	96	+23
Colombia	124	129	130	134	142	+ 6	98	99	96	96	98	+ 2
Ecuador	125	128	122	120	119	— 1	99	98	90	86	83	— 4
Guyana	122	135	128	124	143	+15	99	107	99	94	105	+12
Paraguay	126	127	122	127	133	+14	100	97	90	91	91	+ 1
Peru	129	130	131	128	125	— 2	104	102	99	94	89	— 5
Uruguay	115	96	95	102	111	+ 9	106	87	86	91	97	+ 8
Venezuela	149	151	153	161	176	+ 9	119	116	114	116	122	+ 6
REGIONAL	124	125	127	128	135	+ 5	102	100	98	97	99	+ 2
Agricultural production												
CENTRAL AMERICA												
Costa Rica	155	163	175	172	174	+ 1	124	126	131	126	124	— 2
El Salvador	113	126	123	133	140	+ 5	90	97	91	96	98	+ 2
Guatemala	128	134	143	149	155	+ 4	105	107	111	112	114	+ 1
Honduras	139	157	154	169	153	—10	110	120	114	121	106	—12
Mexico	122	131	130	130	135	+ 4	96	100	95	92	93	—
Nicaragua	123	132	138	141	154	+ 9	101	105	106	105	111	+ 6
Panama	141	152	152	153	159	+ 4	112	117	114	110	111	+ 1
CARIBBEAN												
Barbados	101	92	77	87	83	— 4	101	91	76	86	82	— 5
Cuba	131	114	104	112	119	+ 6	113	97	86	92	96	+ 5
Dominican Republic	126	134	143	147	150	+ 3	100	103	105	104	103	— 1
Haiti	108	113	115	118	120	+ 2	91	93	93	93	92	— 1
Jamaica	104	112	108	108	114	+ 6	89	94	89	87	90	+ 4
SOUTH AMERICA												
Argentina	113	106	109	112	116	+ 4	101	94	95	96	98	+ 2
Bolivia	129	136	142	151	156	+ 3	110	113	115	119	120	+ 1
Brazil	128	131	140	138	149	+ 8	105	105	108	104	109	+ 5
Chile	118	117	113	95	117	+24	101	98	94	77	93	+22
Colombia	126	130	132	136	145	+ 7	100	100	97	97	100	+ 3
Ecuador	125	128	121	120	121	—	99	98	90	86	84	— 3
Guyana	122	135	128	125	143	+15	100	107	99	94	106	+12
Paraguay	125	124	122	133	136	+ 2	99	95	90	95	94	— 1
Peru	121	121	120	119	118	— 1	97	95	91	88	84	— 4
Uruguay	111	97	90	94	101	+ 7	102	88	81	84	88	+ 5
Venezuela	148	150	153	161	177	+10	118	116	114	116	123	+ 6
REGIONAL	122	122	125	126	132	+ 5	100	98	97	95	97	+ 2

ANNEX TABLE 2. — INDICES OF FOOD AND AGRICULTURAL PRODUCTION, BY COUNTRIES, 1970 TO 1974 (*continued*)

Region and country	Total						Per caput					
	1970	1971	1972	1973	1974	Change 1973 to 1974	1970	1971	1972	1973	1974	Change 1973 to 1974
	..... *1961-65 average = 100*					*Percent*	..... *1961-65 average = 100*					*Percent*
FAR EAST												
Food production												
SOUTH ASIA												
Bangladesh	117	107	106	127	117	— 8	92	81	78	90	80	—11
India	123	124	119	127	121	— 5	105	104	97	102	96	— 7
Nepal	111	110	103	114	109	— 4	96	93	85	92	86	— 6
Pakistan	147	144	149	156	157	+ 1	120	113	114	115	113	— 2
Sri Lanka	116	115	115	115	126	+ 9	98	95	93	91	97	+ 7
EAST AND SOUTHEAST ASIA												
Burma	110	111	103	116	116	—	94	92	84	92	90	— 2
Cambodia	146	113	89	62	49	—21	120	90	69	47	36	—24
Indonesia	124	127	127	141	147	+ 4	103	103	99	107	108	+ 1
Korea, Rep. of	129	129	131	132	134	+ 2	108	106	105	103	102	— 1
Laos	152	144	145	154	159	+ 3	128	118	116	120	121	—
Malaysia												
Sabah	149	174	210	214	260	+22	116	131	152	149	175	+17
Sarawak	127	134	141	136	136	—	102	103	105	97	94	— 4
West Malaysia	150	162	170	185	203	+ 9	124	132	134	142	151	+ 6
Philippines	127	128	131	143	144	+ 1	101	98	97	103	100	— 3
Thailand	129	135	127	151	140	— 7	103	105	95	110	99	—10
Viet-Nam, Rep. of South	114	122	123	134	139	+ 3	97	102	101	108	109	+ 1
Developing countries	124	125	121	132	128	— 3	104	102	97	103	97	— 5
China	122	126	124	130	133	+ 2	108	109	106	109	110	+ 1
Japan	120	114	121	122	122	—	112	106	110	110	109	— 1
Agricultural production												
SOUTH ASIA												
Bangladesh	116	104	106	124	114	— 9	92	79	78	88	78	—12
India	121	123	118	127	121	— 4	104	103	97	102	95	— 6
Nepal	111	111	104	115	110	— 4	96	93	85	92	87	— 6
Pakistan	147	148	151	155	157	+ 1	120	117	116	115	112	— 2
Sri Lanka	117	116	116	114	122	+ 7	99	95	93	90	94	+ 4
EAST AND SOUTHEAST ASIA												
Burma	110	111	105	118	117	— 1	94	92	85	94	91	— 3
Cambodia	139	106	86	61	48	—20	114	85	66	45	35	—23
Indonesia	122	125	126	140	145	+ 4	102	101	99	106	107	+ 1
Korea, Rep. of	131	132	136	138	140	+ 2	110	108	109	108	107	— 1
Laos	152	144	145	155	160	+ 3	128	119	116	121	121	+ 1
Malaysia												
Sabah	141	152	170	186	220	+18	110	114	123	130	148	+14
Sarawak	88	88	92	118	123	+ 4	70	68	68	84	85	+ 1
West Malaysia	154	164	166	190	197	+ 4	128	132	131	146	147	+ 1
Philippines	125	126	130	142	143	+ 1	100	97	96	102	99	— 3
Thailand	130	136	130	155	142	— 8	104	106	97	112	100	—11
Viet-Nam, Rep. of South	110	119	119	130	134	+ 3	94	100	98	104	105	+ 1
Developing countries	124	124	122	132	129	— 3	104	102	97	103	98	— 5
China	123	127	125	131	135	+ 2	109	110	107	110	111	+ 1
Japan	119	113	119	120	120	—	111	104	108	108	107	— 1

ANNEX TABLE 2. — INDICES OF FOOD AND AGRICULTURAL PRODUCTION, BY COUNTRIES, 1970 TO 1974 (*continued*)

Region and country	Total						Per caput					
	1970	1971	1972	1973	1974	Change 1973 to 1974	1970	1971	1972	1973	1974	Change 1973 to 1974
	..... *1961-65 average = 100*					*Percent*	..... *1961-65 average = 100*					*Percent*
NEAR EAST												
Food production												
NEAR EAST IN AFRICA												
Egypt	125	130	132	134	136	+ 2	104	105	103	101	100	— 1
Libyan Arab Republic	115	97	177	202	203	—	93	76	135	149	145	— 3
Sudan	147	153	152	152	170	+12	119	121	116	112	121	+ 8
NEAR EAST IN ASIA												
Afghanistan	103	98	112	120	126	+ 6	88	81	91	95	97	+ 3
Cyprus	155	183	174	140	181	+29	146	171	162	128	165	+28
Iran	138	127	140	144	145	+ 1	114	102	108	108	105	— 3
Iraq	132	129	185	131	153	+17	105	98	136	93	105	+13
Jordan	46	64	76	38	77	+105	37	50	58	27	54	+98
Lebanon	120	142	160	150	170	+13	99	113	124	113	123	+ 9
Saudi Arabia	130	138	143	145	155	+ 7	108	111	112	110	115	+ 4
Syrian Arab Republic	81	85	141	78	132	+68	65	66	106	57	93	+63
Turkey	125	131	137	128	143	+12	105	106	108	98	107	+ 9
Yemen Arab Republic	82	107	117	117	110	— 6	68	86	91	89	81	— 9
Yemen, People's Dem. Rep. of	113	120	116	128	132	+ 3	94	97	91	98	97	—
Developing countries	124	127	138	130	143	+10	102	101	107	98	105	+ 6
Israel	143	164	179	180	180	—	118	132	140	138	135	— 2
Agricultural production												
NEAR EAST IN AFRICA												
Egypt	123	127	129	130	132	+ 1	102	102	101	99	97	— 2
Libyan Arab Republic	117	100	174	200	201	+ 1	95	79	132	148	144	— 3
Sudan	149	155	154	149	169	+13	121	122	117	110	120	+ 9
NEAR EAST IN ASIA												
Afghanistan	103	98	112	119	126	+ 6	88	81	91	94	97	+ 3
Cyprus	152	180	172	137	178	+30	144	169	159	126	162	+29
Iran	137	126	141	144	146	+ 1	112	101	109	108	106	— 2
Iraq	134	131	182	131	152	+17	106	100	134	93	105	+12
Jordan	48	66	77	40	79	+96	39	52	58	30	56	+89
Lebanon	121	142	161	152	170	+12	99	113	124	113	123	+ 9
Saudi Arabia	130	138	143	145	155	+ 7	108	111	112	110	115	+ 4
Syrian Arab Republic	85	89	135	84	126	+51	68	69	101	61	89	+46
Turkey	126	134	139	129	146	+13	105	108	110	99	109	+ 9
Yemen Arab Republic	82	108	119	119	112	— 6	68	87	93	91	83	— 9
Yemen, People's Dem. Rep. of	110	118	112	124	127	+ 3	92	96	88	94	94	—
Developing countries	124	127	138	130	143	+10	102	102	107	98	104	+ 6
Israel	146	166	180	181	183	+ 1	120	133	141	139	137	—1

ANNEX TABLE 2. — INDICES OF FOOD AND AGRICULTURAL PRODUCTION, BY COUNTRIES, 1970 TO 1974 (*continued*)

Region and country	Total						Per caput					
	1970	1971	1972	1973	1974	Change 1973 to 1974	1970	1971	1972	1973	1974	Change 1973 to 1974
	..... *1961-65 average = 100*					*Percent*	.... *1961-65 average = 100*					*Percent*
AFRICA												
Food production												
NORTHWEST AFRICA												
Algeria	110	105	126	109	101	— 7	89	83	96	80	72	—10
Morocco	144	148	150	132	151	+15	116	115	113	96	106	+11
Tunisia	118	143	128	155	149	— 4	96	113	98	115	107	— 7
WEST AFRICA												
Dahomey	128	127	121	132	140	+ 6	108	104	96	102	106	+ 3
Gambia	117	124	123	138	147	+ 6	102	106	103	114	118	+ 4
Ghana	124	137	136	137	142	+ 4	101	108	104	101	101	—
Guinea	119	120	115	112	118	+ 6	102	101	94	90	92	+ 3
Ivory Coast	130	144	143	150	157	+ 5	111	120	116	119	121	+ 2
Liberia	104	110	111	111	124	+12	93	96	95	92	102	+10
Mali	106	114	91	72	93	+28	90	95	74	57	72	+25
Mauritania	112	108	95	80	81	+ 2	97	91	78	64	63	— 1
Niger	116	106	105	77	96	+26	96	84	81	57	70	+22
Nigeria	108	110	107	94	104	+10	91	90	85	73	79	+ 8
Senegal	81	113	73	88	98	+11	69	94	59	70	75	+ 8
Sierra Leone	124	128	132	131	137	+ 5	107	107	109	105	107	+ 2
Togo	135	133	105	95	115	+21	114	109	84	74	87	+18
Upper Volta	117	110	104	87	75	—14	102	94	86	71	60	—16
CENTRAL AFRICA												
Angola	120	125	122	122	126	+ 3	105	107	102	100	101	+ 1
Cameroon	139	143	149	144	152	+ 5	122	123	124	118	121	+ 3
Central African Republic	108	112	114	117	117	—	93	95	94	94	92	— 2
Chad	101	100	78	71	74	+ 5	87	84	64	56	58	+ 3
Congo	92	95	97	98	103	+ 5	80	80	79	79	81	+ 3
Gabon	126	128	131	132	132	—	120	121	122	122	121	— 1
Zaire	137	131	141	151	162	+ 7	118	110	115	121	127	+ 5
EAST AFRICA												
Burundi	150	166	210	212	233	+10	129	139	171	169	181	+ 7
Ethiopia	118	117	119	118	113	— 5	103	100	99	96	90	— 7
Kenya	132	127	134	135	135	—	107	100	102	99	96	— 3
Madagascar	118	117	114	115	125	+ 9	98	95	90	88	93	+ 6
Malawi	129	142	157	155	161	+ 3	109	117	126	121	122	+ 1
Mauritius	101	110	120	125	119	— 5	87	94	101	104	98	— 6
Mozambique	118	122	126	132	131	— 1	103	104	105	108	104	— 4
Rhodesia	107	128	140	115	161	+40	85	98	104	82	111	+35
Rwanda	145	148	145	151	131	—13	119	118	112	113	96	—16
Somalia	125	124	138	138	139	+ 1	107	104	113	110	108	— 2
Tanzania	147	139	143	146	144	— 1	124	114	114	113	109	— 4
Uganda	128	124	126	123	125	+ 1	108	101	101	95	94	— 1
Zambia	122	124	129	132	143	+ 9	99	98	99	98	103	+ 5
SOUTHERN AFRICA												
Botswana	139	158	141	162	175	+ 8	120	133	117	130	138	+ 6
Lesotho	104	106	81	128	117	— 8	92	92	69	107	96	—10
Swaziland	157	162	180	168	181	+ 8	129	129	139	126	132	+ 5
Developing countries	121	124	124	121	127	+ 5	102	101	99	94	96	+ 2
South Africa	128	145	155	130	173	+33	108	120	125	102	133	+30

ANNEX TABLE 2. — INDICES OF FOOD AND AGRICULTURAL PRODUCTION, BY COUNTRIES, 1970 TO 1974 (*concluded*)

Region and country	Total						Per caput					
	1970	1971	1972	1973	1974	Change 1973 to 1974	1970	1971	1972	1973	1974	Change 1973 to 1974
Agricultural production	..... *1961-65 average = 100*					*Percent*	..... *1961-65 average = 100*					*Percent*
NORTHWEST AFRICA												
Algeria	111	107	127	110	103	— 7	90	84	97	81	73	—10
Morocco	144	147	149	132	152	+15	116	115	112	96	107	+11
Tunisia	118	142	129	155	149	— 4	96	112	98	115	107	— 7
WEST AFRICA												
Dahomey	133	134	130	141	149	+ 6	112	110	104	110	113	+ 3
Gambia	117	124	123	138	147	+ 6	102	106	103	114	118	+ 4
Ghana	124	137	136	137	142	+ 4	101	108	104	101	102	—
Guinea	119	120	114	112	118	+ 6	102	101	94	90	92	+ 3
Ivory Coast	132	147	147	154	161	+ 5	113	123	119	122	125	+ 2
Liberia	130	134	134	135	155	+14	115	117	115	113	127	+12
Mali	109	118	95	75	96	+28	93	98	77	60	74	+24
Mauritania	112	108	95	80	81	+ 2	97	91	78	64	63	— 1
Niger	117	106	105	76	96	+26	96	84	81	57	70	+22
Nigeria	107	110	107	95	105	+11	90	90	86	74	79	+ 8
Senegal	82	115	74	90	100	+11	70	95	60	21	77	+ 8
Sierra Leone	124	127	132	130	136	+ 5	106	107	108	104	107	+ 2
Togo	135	133	106	97	116	+20	114	110	85	75	88	+16
Upper Volta	119	113	107	90	77	—14	104	96	89	73	61	—16
CENTRAL AFRICA												
Angola	122	126	123	121	129	+ 6	106	108	103	99	104	+ 4
Cameroon	139	142	148	142	151	+ 6	121	121	124	116	120	+ 3
Central African Republic	111	115	118	118	119	+ 1	96	97	97	96	94	— 2
Chad	102	103	82	75	79	+ 5	87	86	66	60	61	+ 3
Congo	93	95	97	99	104	+ 5	80	80	80	79	81	+ 3
Gabon	126	128	131	132	132	—	120	121	122	122	121	— 1
Zaire	136	130	139	150	161	+ 7	117	109	114	120	126	+ 5
EAST AFRICA												
Burundi	150	166	209	212	232	+10	129	139	171	169	180	+ 7
Ethiopia	118	118	120	120	114	— 4	103	100	100	98	91	— 7
Kenya	129	124	130	132	134	+ 1	105	98	99	98	96	— 2
Madagascar	118	117	115	116	127	+ 9	98	95	90	89	94	+ 6
Malawi	130	144	160	157	162	+ 3	109	118	129	123	124	+ 1
Mauritius	101	110	120	125	119	— 5	87	94	101	104	98	— 6
Mozambique	119	120	125	130	127	— 2	103	102	104	106	101	— 5
Rhodesia	100	115	126	102	144	+41	79	88	93	73	99	+36
Rwanda	145	148	145	151	131	—13	119	118	112	113	95	—16
Somalia	125	124	137	138	139	+ 1	107	104	112	109	108	— 2
Tanzania	141	133	136	138	138	—	118	109	108	107	104	— 3
Uganda	128	123	125	122	123	—	107	100	100	95	92	— 3
Zambia	119	122	127	130	141	+ 8	97	97	97	97	101	+ 5
SOUTHERN AFRICA												
Botswana	137	156	140	160	173	— 8	118	132	115	129	136	+ 6
Lesotho	105	105	80	122	111	— 9	93	91	68	102	91	—11
Swaziland	156	163	181	170	184	+ 8	128	130	140	127	133	+ 5
Developing countries	121	123	124	121	127	+ 5	102	101	99	94	96	+ 3
South Africa	124	140	147	125	164	+31	105	115	119	98	126	+28

ANNEX TABLE 3. — VOLUME OF EXPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	Million metric tons												
World [1]													
AGRICULTURAL PRODUCTS													
Wheat and wheat flour (wheat equivalent)	44.87	49.67	59.11	56.46	62.64	52.87	53.26	48.61	57.16	58.49	64.93	81.54	65.39
Barley	6.64	5.70	7.99	8.06	6.41	7.21	6.39	7.11	10.47	11.00	13.82	12.33	11.61
Maize	19.92	21.10	22.32	25.03	25.86	27.58	28.90	27.47	29.42	30.85	37.29	48.06	50.55
Oats	1.48	1.26	1.37	1.75	1.40	1.26	1.05	1.01	1.51	1.62	2.13	1.67	1.36
Rye	2.12	1.53	0.67	0.47	0.76	0.81	0.56	0.55	0.62	1.03	0.68	2.01	1.20
Millet and sorghum	3.91	3.98	3.84	5.36	9.20	7.79	5.28	4.75	6.69	6.65	6.50	9.59	11.05
Rice (milled equivalent) [2]	6.74	7.99	8.35	8.38	8.33	8.19	7.95	8.43	8.82	9.32	9.46	9.26	8.85
Sugar (raw equivalent) [3]	18.78	17.69	17.13	19.05	18.64	20.17	20.33	19.41	21.81	21.38	22.17	23.21	22.99
Potatoes	3.37	2.94	3.63	3.78	3.56	3.37	3.41	3.58	3.78	3.02	5.12	3.90	3.88
Pulses (dry)	1.39	1.53	1.48	2.26	2.07	1.69	1.81	2.16	1.78	1.78	1.97	2.06	1.78
Apples	1.72	1.52	1.73	2.00	1.91	1.99	2.10	2.27	2.12	2.28	2.65	2.42	2.73
Bananas	3.98	4.27	4.33	4.75	5.17	5.21	5.66	5.66	5.92	6.53	6.75	6.91	6.56
Citrus fruit [4]	3.65	3.36	4.20	4.30	4.30	4.48	4.40	4.62	5.00	4.87	5.23	5.63	5.45
Grapes (fresh)	0.79	0.76	0.78	0.98	0.80	0.82	0.80	0.95	0.86	0.99	0.78	0.88	0.89
Dates	0.32	0.42	0.37	0.35	0.38	0.35	0.33	0.38	0.43	0.35	0.39	0.40	0.36
Vegetable oils and oilseeds (oil equivalent) [5]	6.87	6.97	7.41	7.54	8.12	8.32	8.90	9.05	9.80	10.64	11.62	11.69	11.85
Oilseed cake and meal	6.58	6.90	7.27	8.19	8.84	8.89	9.18	9.67	11.00	11.63	12.62	14.21	14.49
Cattle [6]	5.06	5.26	4.98	5.57	5.31	5.60	6.28	6.61	6.93	6.96	7.73	6.94	6.08
Sheep, lambs and goats [6]	8.03	8.41	8.22	8.83	9.51	9.03	9.80	10.03	10.19	10.77	11.22	10.75	10.29
Pigs [6]	2.66	2.38	2.96	3.80	3.40	3.19	3.40	3.93	4.52	5.36	5.89	5.69	5.93
Meat [7]	2.89	3.34	3.33	3.49	3.54	3.81	3.93	4.29	4.57	4.72	5.33	5.65	5.18
Milk (condensed, evaporated and powdered)	1.56	1.76	1.92	1.94	1.95	2.11	2.27	2.33	2.61	2.98	2.90	3.60	4.07
Eggs (in the shell)	0.48	0.41	0.37	0.35	0.32	0.33	0.34	0.37	0.41	0.45	0.46	0.46	0.52
Coffee (green)	2.90	3.10	2.87	2.78	3.11	3.18	3.39	3.43	3.27	3.31	3.51	3.75	3.41
Cocoa beans	1.05	1.05	1.05	1.31	1.13	1.09	1.06	1.02	1.13	1.19	1.24	1.11	1.18
Tea	0.62	0.62	0.64	0.66	0.64	0.69	0.73	0.69	0.75	0.75	0.76	0.78	0.78
Wine	2.96	2.39	2.68	2.57	2.80	2.41	2.51	3.22	3.71	3.52	4.30	4.75	4.25
Pepper and pimento	0.14	0.15	0.14	0.14	0.15	0.19	0.20	0.18	0.18	0.20	0.20	0.20	0.21
Tobacco (unmanufactured)	0.87	0.90	1.01	0.98	0.92	0.99	1.00	1.00	0.99	1.03	1.21	1.22	1.38
Wool (actual weight)	1.46	1.45	1.41	1.44	1.50	1.38	1.50	1.53	1.50	1.39	1.48	1.37	1.03
Cotton (lint)	3.41	3.76	3.95	3.77	4.01	3.85	3.85	3.72	3.94	4.02	4.06	4.71	3.96
Jute and kenaf	1.03	1.27	1.06	1.15	1.39	1.27	0.92	0.92	1.00	0.91	1.00	0.98	0.95
Rubber (natural) [8]	2.35	2.17	2.30	2.39	2.43	2.42	2.69	2.96	2.86	2.93	2.89	3.41	3.25
FISHERY PRODUCTS													
Fresh, chilled or frozen fish	1.34	1.48	1.71	1.72	1.80	1.79	1.82	1.80	2.02	2.04	2.17	2.57	2.52
Dried, salted or smoked fish	0.55	0.54	0.50	0.50	0.50	0.50	0.49	0.50	0.52	0.48	0.51	0.50	0.46
Crustacea and molluscs, fresh, frozen, dried, salted, etc.	0.27	0.27	0.30	0.30	0.30	0.32	0.34	0.38	0.44	0.52	0.62	0.65	0.67
Fish products and preparations, whether or not in airtight containers	0.54	0.51	0.58	0.52	0.57	0.55	0.61	0.59	0.61	0.63	0.68	0.76	0.76
Crustacean and mollusc products and preparations, whether or not in airtight containers	0.05	0.05	0.06	0.06	0.06	0.07	0.07	0.07	0.07	0.07	0.08	0.10	0.09
Oils and fats, crude or refined, of aquatic animal origin	0.67	0.74	0.63	0.72	0.68	0.81	0.83	0.70	0.64	0.71	0.75	0.55	0.55
Meals, solubles and similar animal feedstuffs of aquatic animal origin	1.72	1.78	2.44	2.47	2.48	3.02	3.55	3.03	3.00	3.00	2.97	1.61	1.96
FOREST PRODUCTS													
Pulpwood [9]	12.2	11.6	13.2	13.8	14.2	14.7	14.1	15.9	18.6	16.3	14.9	16.7	20.0
Coniferous logs [9]	6.4	8.7	9.9	11.6	13.8	17.2	21.1	20.4	24.7	21.9	25.8	29.0	26.8
Broadleaved logs [9]	14.6	18.0	20.0	21.2	23.8	25.2	30.1	35.0	38.8	40.9	43.5	53.3	48.2
Sawn softwood [9]	38.2	41.4	44.6	44.0	42.6	42.8	47.5	47.3	49.5	51.7	59.4	60.9	53.5
Sawn hardwood [9]	4.3	4.6	5.4	5.6	5.8	5.7	6.3	6.9	7.2	7.1	8.4	10.2	8.3
Plywood and veneers [9]	2.1	2.4	3.0	3.1	3.5	3.8	4.7	5.0	5.3	6.0	7.2	7.9	7.1

See notes at end of table.

ANNEX TABLE 3. — VOLUME OF EXPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*continued*)

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	Million metric tons												
FOREST PRODUCTS (*concluded*)													
Fibreboard	0.9	1.0	1.1	1.1	1.1	1.2	1.3	1.4	1.4	1.5	1.6	1.7	1.6
Mechanical wood pulp	1.2	1.3	1.4	1.4	1.4	1.2	1.3	1.3	1.3	1.0	1.2	1.3	1.3
Chemical wood pulp	9.0	10.1	11.1	11.1	12.0	12.4	13.7	14.9	15.6	14.0	15.2	17.2	17.6
Newsprint	7.5	7.8	8.5	9.0	9.7	9.4	9.7	10.6	10.6	10.3	10.8	11.1	11.5
Other paper and paperboard	5.3	5.9	6.9	7.5	8.4	8.8	10.2	11.9	12.8	13.2	14.5	16.4	18.8
Western Europe													
AGRICULTURAL PRODUCTS													
Wheat and wheat flour (wheat equivalent)	3.70	5.08	5.29	7.00	6.45	6.16	8.42	10.91	9.39	7.13	10.14	12.71	12.39
Barley	1.71	2.29	3.16	2.63	3.37	4.08	4.21	4.32	4.39	3.78	5.31	5.59	5.97
Maize	0.35	0.94	1.27	1.90	2.11	2.78	2.54	3.24	3.88	5.30	4 59	5.61	5.98
Rye	0.18	0.16	0.05	0.05	0.06	0.05	0.09	0.14	0.20	0.39	0.39	0.54	0.40
Sugar (raw equivalent)[3]	1.25	1.60	1.45	1.54	1.28	1.15	1.66	1.45	1.97	2.02	2.82	2.83	2.64
Potatoes	1.83	1.65	1.70	2.26	1.98	1.86	1.85	2.42	2.22	1.90	2.76	2.49	2.34
Pulses (dry)	0.22	0.18	0.15	0.18	0.20	0.25	0.29	0.28	0.26	0.26	0.29	0.29	0.25
Apples	0.87	0.53	0.70	0.86	0.76	0.78	0.86	0.95	0.94	1.06	1.31	1.16	1.31
Citrus fruit[4]	1.74	1.22	2.00	1.91	1.98	1.94	1.80	1.92	2.29	1.98	2.26	2.32	2.37
Grapes (fresh)	0.34	0.29	0.38	0.41	0.41	0.42	0.41	0.41	0.44	0.48	0.41	0.44	0.44
Vegetable oils and oilseeds (oil equivalent)[10]	0.50	0.49	0.56	0.52	0.55	0.67	0.76	0.98	1.23	1.43	1.53	1.73	1.83
Oilseed cake and meal	0.93	0.89	1.03	1.07	1.17	1.27	1.19	1.34	1.56	1.79	2.14	2.70	2.86
Cattle[6]	1.37	1.85	1.88	1.75	1.46	2.00	2.34	2.48	2.60	2.74	3.09	2.57	2.31
Sheep, lambs and goats[6]	1.30	1.35	0.88	0.85	0.58	0.72	0.93	0.98	0.63	0.72	0.78	0.61	0.58
Pigs[6]	0.49	0.40	0.66	0.82	0.50	0.88	1.17	1.90	2.35	2.29	2.45	2.55	2.57
Meat (fresh, chilled and frozen)[7]	0.86	0.93	0.91	1.03	1.02	1.22	1.32	1.37	1.55	1.81	1.82	1.93	2.21
Bacon, ham and salted pork	0.37	0.35	0.36	0.38	0.37	0.37	0.38	0.36	0.36	0.36	0.35	0.32	0.30
Milk (condensed, evaporated and powdered)	0.91	0.93	0.99	1.18	1.41	1.51	1.69	1.70	1.84	2.27	2.25	2.97	3.34
Butter	0.24	0.24	0.23	0.27	0.27	0.31	0.35	0.33	0.49	0.45	0.36	0.77	0.69
Cheese	0.36	0.38	0.40	0.42	0.47	0.48	0.52	0.53	0.60	0.61	0.66	0.74	0.82
Eggs (in the shell)	0.29	0.24	0.20	0.15	0.14	0.13	0.15	0.19	0.23	0.26	0.27	0.27	0.31
Wine	1.00	1.14	1.12	1.20	1.30	1.28	1.32	1.46	1.78	2.36	3.05	2.92	2.83
Wool (actual weight)	0.13	0.14	0.11	0.12	0.12	0.10	0.12	0.11	0.10	0.10	0.12	0.11	0.09
	Thousand metric tons												
FISHERY PRODUCTS													
Fresh, chilled or frozen fish	771.7	849.9	877.0	907.7	876.5	861.2	905.8	971.7	1098.4	1035.0	1061.0	1092.2	1019.9
Dried, salted or smoked fish	353.8	334.3	314.7	323.2	317.4	312.9	311.9	337.2	338.4	314.8	345.6	329.2	282.8
Crustacea and molluscs, fresh, frozen, dried, salted, etc.	123.4	114.0	118.9	108.8	113.7	116.4	130.8	133.8	151.6	188.2	244.0	198.0	227.9
Fish products and preparations, whether or not in airtight containers	211.7	196.7	209.1	221.4	211.3	193.6	195.5	172.8	183.7	175.7	214.0	234.0	223.5
Crustacean and mollusc products and preparations, whether or not in airtight containers	9.0	9.0	13.0	13.0	13.0	12.6	13.3	15.4	19.2	20.1	24.9	26.1	24.4
Oils and fats, crude or refined, of aquatic animal origin	243.9	199.8	190.0	266.2	340.1	391.5	260.1	270.0	171.7	149.1	196.0	271.6	193.3
Meals, solubles and similar animal feedstuffs of aquatic animal origin	240.2	306.9	434.8	555.0	576.8	810.7	787.5	657.9	606.2	726.1	839.7	796.0	801.8
	Million metric tons												
FOREST PRODUCTS													
Pulpwood[9]	4.28	3.34	3.62	3.61	3.01	3.82	4.17	5.22	6.71	6.23	5.51	5.09	5.67
Coniferous logs[9]	1.14	1.05	1.06	1.03	1.35	1.55	1.37	1.23	1.46	1.35	1.39	2.22	2.86
Broadleaved logs[9]	0.93	0.91	0.97	1.02	1.10	1.17	1.20	1.23	1.35	1.47	1.55	1.86	2.17
Pitprops[9]	1.37	1.07	0.83	0.56	0.54	0.36	0.39	0.49	0.57	0.49	0.43	0.49	0.49
Sawn softwood[9]	13.86	13.86	14.62	13.57	12.72	12.85	15.05	16.24	16.21	16.55	18.09	20.30	17.04

See notes at end of table.

ANNEX TABLE 3. — VOLUME OF EXPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*continued*)

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	Million metric tons												
FOREST PRODUCTS (*concluded*)													
Sawn hardwood [9]	0.96	0.98	1.14	1.21	1.26	1.23	1.35	1.44	1.51	1.52	1.77	2.25	1.85
Plywood and veneers [9]	0.66	0.73	0.83	0.86	0.88	0.92	1.05	1.16	1.21	1.23	1.30	1.52	1.28
Fibreboard	0.79	0.84	0.88	0.82	0.75	0.82	0.87	0.90	0.88	0.87	0.90	0.92	0.90
Particle board	0.43	0.48	0.56	0.80	0.89	1.04	1.20	1.45	1.69	2.20	2.43	3.03	2.95
Mechanical wood pulp	0.97	1.05	1.15	1.12	1.13	1.00	1.06	1.04	1.04	0.77	0.86	1.08	1.00
Chemical wood pulp	4.83	5.35	5.85	5.78	6.27	6.20	6.54	6.76	6.74	5.63	6.34	7.59	7.10
Newsprint	1.63	1.71	1.88	1.97	2.07	2.10	2.31	2.43	2.56	2.49	2.69	2.75	2.60
Other paper and paperboard	3.77	4.24	4.75	5.13	5.55	5.67	6.49	7.74	8.17	8.36	9.34	10.84	12.30
Eastern Europe and U.S.S.R.													
AGRICULTURAL PRODUCTS													
Wheat and wheat flour (wheat equivalent)	5.18	4.98	2.52	2.32	4.51	7.68	6.91	7.98	6.83	9.28	5.88	7.04	8.35
Barley	0.61	0.69	0.76	2.14	0.39	0.54	0.67	0.82	0.73	0.80	0.67	0.46	1.04
Maize	2.34	1.79	1.94	1.38	0.83	1.60	0.74	1.54	1.12	0.88	0.95	1.57	1.84
Rye	1.35	0.89	0.17	0.07	0.32	0.45	0.28	0.30	0.25	0.22	0.04	0.37	0.39
Sugar (raw equivalent) [3]	3.23	2.19	1.71	2.02	2.17	2.42	2.68	2.15	2.11	1.71	0.96	0.92	0.72
Potatoes	0.70	0.50	1.18	0.79	0.77	0.70	0.71	0.30	0.63	0.34	1.51	0.53	0.67
Sunflowerseed	0.22	0.16	0.27	0.20	0.35	0.49	0.47	0.57	0.31	0.21	0.23	0.14	0.10
Oilseed cake and meal	0.38	0.23	0.07	0.16	0.42	0.40	0.34	0.34	0.04	0.02	0.01	0.01	—
Meat (fresh, chilled and frozen) [7]	0.30	0.31	0.24	0.33	0.34	0.48	0.46	0.42	0.32	0.37	0.39	0.42	0.48
Butter	0.11	0.10	0.06	0.08	0.10	0.12	0.12	0.11	0.11	0.05	0.04	0.06	0.08
Eggs (in the shell)	0.11	0.08	0.08	0.11	0.09	0.11	0.09	0.08	0.09	0.11	0.10	0.10	0.11
Cotton	0.35	0.32	0.39	0.46	0.52	0.55	0.57	0.45	0.52	0.55	0.65	0.73	0.74
	Thousand metric tons												
FISHERY PRODUCTS													
Fresh, chilled or frozen fish	33.7	80.9	88.9	178.3	229.5	216.0	236.1	230.6	306.5	338.4	332.8	370.5	482.5
Dried, salted or smoked fish	40.5	44.4	35.3	39.9	28.6	36.0	25.4	23.1	21.6	16.7	16.0	14.6	13.3
Crustacea and molluscs, fresh, frozen, dried, salted, etc.	0.3	0.6	1.1	1.2	1.3	1.3	0.6	0.9	1.7	1.4	1.6	0.8	1.2
Fish products and preparations, whether or not in airtight containers	24.3	19.3	18.9	19.6	22.7	24.2	27.1	28.8	29.4	28.1	28.5	30.9	32.2
Crustacean and mollusc products and preparations, whether or not in airtight containers	3.0	5.0	5.6	4.9	5.0	5.0	4.7	3.4	3.8	3.5	3.4	2.1	1.9
Oils and fats, crude or refined, of aquatic animal origin	15.2	32.2	40.0	57.1	71.9	58.3	59.6	64.0	34.5	14.6	17.1	5.3	5.5
Meals, solubles and similar animal feedstuffs of aquatic animal origin	3.7	3.8	4.2	7.2	14.2	38.3	30.6	32.6	13.5	12.2	18.7	12.4	11.2
	Million metric tons												
FOREST PRODUCTS													
Pulpwood [9]	4.40	5.13	6.00	6.38	7.32	7.49	6.88	7.57	8.68	7.57	7.28	9.78	12.50
Coniferous logs [9]	2.62	2.89	3.43	4.72	5.04	5.01	6.12	6.38	7.57	7.38	8.00	10.54	8.82
Pitprops [9]	1.36	1.58	1.53	1.58	1.31	0.96	0.85	0.88	0.97	0.88	0.82	0.96	0.96
Sawn softwood [9]	8.47	9.49	10.96	11.17	11.44	10.88	10.93	10.74	11.01	10.76	11.07	11.07	11.00
Plywood and veneers [9]	0.25	0.28	0.29	0.38	0.38	0.40	0.45	0.45	0.47	0.43	0.44	0.51	0.40
Wood pulp	0.34	0.32	0.37	0.37	0.39	0.47	0.51	0.57	0.55	0.55	0.61	0.67	0.70
North America													
AGRICULTURAL PRODUCTS													
Wheat and wheat flour (wheat equivalent)	25.97	31.89	38.26	32.38	40.23	29.11	27.84	21.10	30.59	31.17	37.25	51.35	36.67
Barley	2.59	1.62	2.48	2.11	2.04	2.02	1.03	0.80	4.15	5.16	5.75	5.17	3.55
Maize	10.83	11.15	12.19	15.20	15.56	12.94	14.96	13.97	14.41	12.92	22.41	33.22	29.87

See notes at end of table.

ANNEX TABLE 3. — VOLUME OF EXPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*continued*)

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
AGRICULTURAL PRODUCTS (*concluded*)						*Million metric tons*							
Millet and sorghum	2.80	2.95	2.56	4.41	7.44	5.84	3.61	2.77	3.81	2.89	3.90	5.65	5.74
Rye	0.57	0.48	0.29	0.18	0.35	0.31	0.18	0.09	0.15	0.41	0.24	1.00	0.30
Rice (milled equivalent) [2]	1.05	1.20	1.33	1.55	1.35	1.85	1.90	1.92	1.74	1.48	2.04	1.63	1.73
Citrus fruit [4]	0.27	0.26	0.30	0.33	0.37	0.42	0.27	0.39	0.39	0.39	0.46	0.49	0.53
Pulses (dry)	0.26	0.34	0.28	0.30	0.32	0.30	0.27	0.35	0.40	0.34	0.36	0.43	0.33
Vegetable oils and oilseeds (oil equivalent) [11]	1.78	1.78	2.20	2.33	2.18	2.27	2.33	2.47	3.54	3.92	4.04	4.07	4.25
Oilseed cake and meal	1.38	1.69	1.95	2.47	2.67	2.75	3.00	3.28	3.97	4.43	4.01	4.95	5.21
Milk (condensed, evaporated and powdered)	0.48	0.62	0.72	0.51	0.29	0.27	0.29	0.32	0.37	0.33	0.24	0.18	0.12
Tobacco (unmanufactured)	0.24	0.25	0.26	0.23	0.27	0.28	0.30	0.29	0.26	0.24	0.30	0.31	0.33
Cotton (lint)	0.87	0.99	1.19	0.86	0.82	0.91	0.88	0.55	0.68	0.94	0.70	1.25	1.17
						Thousand metric tons							
FISHERY PRODUCTS													
Fresh, chilled or frozen fish	157.3	159.1	197.5	216.4	240.0	224.9	252.1	225.4	211.2	224.6	233.8	264.1	200.3
Dried, salted or smoked fish	59.9	70.0	61.4	54.3	53.6	56.2	56.7	51.9	54.1	60.2	57.9	57.8	55.4
Crustacea and molluscs, fresh, frozen, dried, salted, etc.	18.9	22.8	24.5	25.6	23.7	24.2	26.9	34.0	36.1	38.4	36.2	47.3	38.7
Fish products and preparations, whether or not in airtight containers	26.4	31.2	42.8	36.0	37.1	42.4	34.6	36.4	31.3	31.6	38.0	45.2	32.8
Crustacean and mollusc products and preparations, whether or not in airtight containers	6.6	7.2	7.7	10.4	10.6	11.5	9.7	9.5	8.5	9.8	9.4	10.1	8.4
Oils and fats, crude or refined, of aquatic animal origin	61.7	129.8	87.4	58.7	41.1	46.7	37.6	103.8	94.8	118.1	95.1	120.7	100.6
Meals, solubles and similar animal feedstuffs of aquatic animal origin	46.2	54.3	60.4	57.5	51.7	51.3	66.0	73.0	77.4	71.8	42.3	62.9	85.1
						Million metric tons							
FOREST PRODUCTS													
Pulpwood [9]	3.20	2.88	3.14	3.44	3.52	3.07	2.64	2.66	2.84	2.10	1.70	1.45	1.51
Coniferous logs [9]	2.24	4.33	4.85	5.25	6.42	9.25	11.84	10.93	13.39	10.85	14.10	14.25	13.22
Broadleaved logs [9]	0.40	0.41	0.38	0.45	0.52	0.52	0.51	0.43	0.37	0.34	0.50	0.75	0.63
Sawn softwood [9]	14.50	16.68	17.36	17.43	16.51	17.25	19.16	18.27	20.06	22.02	25.71	27.30	22.87
Sawn hardwood [9]	0.60	0.59	0.69	0.74	0.91	0.81	0.66	0.75	0.67	0.79	1.01	1.07	0.85
Plywood and veneers [9]	0.29	0.31	0.45	0.50	0.60	0.62	0.67	0.72	0.68	0.80	0.90	1.09	1.23
Mechanical wood pulp	0.24	0.23	0.26	0.29	0.24	0.22	0.22	0.25	0.28	0.23	0.27	0.27	0.27
Chemical wood pulp	3.59	4.08	4.47	4.59	4.86	5.21	5.97	6.91	7.59	6.88	7.31	7.77	8.69
Newsprint	5.68	5.74	6.29	6.60	7.19	6.85	6.90	7.60	7.47	7.24	7.49	7.71	7.99
Other paper and paperboard	1.04	1.22	1.57	1.76	2.01	2.22	2.64	2.83	3.03	3.33	3.48	3.55	4.40
Oceania													
AGRICULTURAL PRODUCTS													
Wheat and wheat flour (wheat equivalent)	6.29	4.82	7.81	6.47	5.68	6.97	6.99	5.37	7.38	9.48	8.71	5.66	5.33
Barley	0.71	0.23	0.40	0.37	0.23	0.43	0.13	0.45	0.63	1.12	1.83	0.84	0.81
Oats	0.35	0.32	0.30	0.37	0.25	0.40	0.18	0.33	0.22	0.56	0.33	1.11	0.18
Sugar (raw equivalent) [3]	0.86	1.17	1.14	1.29	1.27	1.67	1.63	2.07	1.39	1.57	2.01	2.09	1.81
Beef and veal	0.32	0.39	0.41	0.44	0.38	0.37	0.39	0.39	0.51	0.52	0.59	0.79	0.68
Mutton and lamb	0.40	0.45	0.46	0.47	0.47	0.46	0.53	0.58	0.59	0.60	0.69	0.63	0.44
Butter	0.25	0.25	0.28	0.29	0.28	0.31	0.28	0.27	0.30	0.28	0.25	0.25	0.22
Cheese	0.12	0.12	0.12	0.12	0.12	0.13	0.13	0.11	0.13	0.13	0.12	0.12	0.11
Wool (actual weight)	0.90	0.89	0.92	0.89	0.92	0.88	0.94	1.01	1.06	0.98	1.04	0.99	0.74
						Thousand metric tons							
FISHERY PRODUCTS													
Fresh, chilled or frozen fish	3.0	3.0	4.0	4.4	5.0	3.0	3.8	4.1	7.8	10.0	14.4	13.7	13.1
Crustacea and molluscs, fresh, frozen, dried, salted, etc.	6.0	6.0	7.0	8.0	8.0	10.1	13.0	12.9	13.6	16.3	17.5	16.7	16.2

See notes at end of table.

ANNEX TABLE 3. — VOLUME OF EXPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*continued*)

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
						Thousand metric tons							
FISHERY PRODUCTS (*concluded*)													
Fish products and preparations, whether or not in airtight containers	0.1	0.1	0.1	0.1	—	0.4	0.5	0.6	0.7	1.0	0.4	1.8	0.4
Crustacean and mollusc products and preparations, whether or not in airtight containers	—	—	—	1.0	1.0	1.2	2.0	2.0	1.9	2.6	3.6	3.0	2.4
Oils and fats, crude or refined, of aquatic animal origin	8.0	4.0	5.3	9.0	6.0	3.9	6.5	5.6	4.2	6.4	5.8	7.7	7.9
Meals, solubles and similar animal feedstuffs of aquatic animal origin	—	—	—	—	—	—	0.3	0.1	—	1.8	—	—	—
						Million cubic metres							
FOREST PRODUCTS													
Coniferous logs	0.29	0.29	0.36	0.45	0.55	0.80	1.44	1.68	1.80	1.81	1.80	1.93	1.80
						Million metric tons							
Latin America													
AGRICULTURAL PRODUCTS													
Wheat and wheat flour (wheat equivalent)	2.88	1.98	4.32	7.45	5.27	2.37	2.45	2.79	2.47	1.16	1.81	3.14	2.08
Maize	3.00	3.18	3.75	4.79	5.29	6.05	5.08	5.52	6.78	7.76	3.64	4.14	6.74
Millet and sorghum	0.68	0.64	0.89	0.34	1.18	1.17	0.88	1.54	2.19	2.51	0.75	2.46	3.28
Rye	0.01	—	0.11	0.10	—	—	0.02	0.01	0.03	—	—	0.09	0.11
Rice (milled equivalent) [2]	0.29	0.16	0.15	0.44	0.60	0.33	0.47	0.36	0.41	0.43	0.19	0.32	0.37
Sugar (raw equivalent) [3, 12]	8.89	7.69	7.63	9.27	8.60	10.25	9.52	9.26	11.66	10.73	10.95	11.95	11.78
Bananas	3.20	3.45	3.37	3.67	4.10	4.18	4.71	4.68	4.86	5.20	5.33	5.47	4.98
Vegetable oils and oilseeds (oil equivalent) [13]	0.61	0.54	0.44	0.63	0.53	0.65	0.49	0.60	0.71	0.65	0.77	1.03	1.03
Oilseed cake and meal	1.50	1.42	1.29	1.66	1.72	1.55	1.51	1.71	2.18	2.35	2.62	2.82	3.00
Cattle	1.39	1.20	0.88	1.04	1.07	1.06	1.20	1.36	1.44	1.24	1.47	1.04	0.98
Beef and veal	0.51	0.68	0.62	0.51	0.54	0.52	0.48	0.70	0.71	0.55	0.84	0.68	0.42
Coffee (green)	1.92	2.07	1.82	1.69	1.91	1.94	2.12	2.10	1.94	2.01	2.10	2.19	1.81
Cocoa beans	0.15	0.18	0.16	0.19	0.21	0.22	0.20	0.21	0.22	0.23	0.22	0.17	0.23
Tobacco (unmanufactured)	0.11	0.13	0.15	0.13	0.11	0.12	0.12	0.14	0.15	0.16	0.18	0.18	0.25
Wool (actual weight)	0.21	0.19	0.14	0.20	0.22	0.19	0.22	0.17	0.17	0.15	0.11	0.11	0.08
Cotton (lint)	1.01	0.97	0.91	1.03	1.05	0.80	0.89	1.17	0.92	0.68	0.84	0.84	0.68
						Thousand metric tons							
FISHERY PRODUCTS													
Fresh, chilled or frozen fish	33.7	35.9	24.3	30.6	32.0	39.5	40.2	47.4	53.9	56.0	72.1	104.7	116.2
Dried, salted or smoked fish	1.1	—	1.6	1.6	0.4	0.8	0.8	1.0	1.5	1.1	1.6	7.2	8.1
Crustacea and molluscs, fresh, frozen, dried, salted, etc.	62.1	62.2	64.5	68.5	65.3	70.3	68.3	73.7	88.1	87.4	90.8	92.4	86.0
Fish products and preparations, whether or not in airtight containers	20.6	17.8	18.2	14.0	14.1	8.2	9.8	8.2	8.7	16.0	19.3	24.3	17.9
Crustacean and mollusc products and preparations, whether or not in airtight containers	4.0	4.7	3.5	5.0	3.4	3.2	3.8	4.8	4.7	2.6	3.4	2.7	3.9
Oils and fats, crude or refined, of aquatic animal origin	161.3	154.2	137.6	171.3	114.9	210.6	344.9	178.1	217.5	308.0	318.5	12.5	94.5
Meals, solubles and similar animal feedstuffs of aquatic animal origin	1143.7	1139.4	1590.6	1500.3	1506.6	1727.4	2269.5	1860.0	2011.8	1972.0	1712.3	396.2	759.1
						Million cubic metres							
FOREST PRODUCTS													
Pulpwood	0.34	0.24	0.41	0.34	0.36	0.33	0.36	0.42	0.38	0.37	0.38	0.32	0.30
Broadleaved logs	0.40	0.36	0.41	0.54	0.55	0.40	0.39	0.38	0.36	0.31	0.22	0.52	0.50
Sawn softwood	1.06	1.05	1.39	1.49	1.66	1.52	1.94	1.60	1.52	1.64	1.33	1.50	1.50

See notes at end of table.

ANNEX TABLE 3. — VOLUME OF EXPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*continued*)

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	Million metric tons												
Far East [14]													
AGRICULTURAL PRODUCTS													
Maize	0.69	0.94	1.32	0.95	1.52	1.39	1.73	1.79	1.75	2.15	1.95	1.63	2.70
Rice (milled equivalent) [2]	4.00	4.65	4.65	4.39	3.74	3.00	2.31	2.33	2.72	2.93	3.28	2.19	2.11
Sugar (raw equivalent) [3]	1.62	1.98	1.75	1.62	1.64	1.22	1.17	1.20	1.62	2.23	1.86	2.05	2.72
Pulses (dry)	0.21	0.24	0.20	0.26	0.25	0.20	0.18	0.24	0.23	0.26	0.23	0.24	0.22
Vegetable oils and oilseeds (oil equivalent) [5,15]	1.56	1.65	1.66	1.51	1.76	1.48	1.81	1.69	1.78	2.22	2.71	2.56	2.39
Oilseed cake and meal	1.33	1.57	1.66	1.49	1.44	1.36	1.47	1.30	1.55	1.57	1.85	2.13	1.98
Coffee (green)	0.14	0.18	0.12	0.17	0.18	0.27	0.19	0.26	0.22	0.20	0.20	0.21	0.21
Tea	0.47	0.48	0.48	0.49	0.45	0.49	0.49	0.44	0.48	0.47	0.47	0.46	0.46
Pepper and pimento	0.11	0.11	0.09	0.09	0.10	0.14	0.14	0.11	0.11	0.13	0.13	0.13	0.13
Cotton (lint)	0.17	0.27	0.26	0.22	0.21	0.21	0.20	0.24	0.15	0.23	0.34	0.25	0.10
Jute and kenaf	1.00	1.22	1.00	1.08	1.33	1.21	0.87	0.87	0.94	0.85	0.96	0.94	0.92
Rubber (natural) [8]	2.07	1.91	2.05	2.12	2.14	2.14	2.43	2.71	2.60	2.67	2.63	3.14	2.98
	Thousand metric tons												
FISHERY PRODUCTS													
Fresh, chilled or frozen fish	74.9	84.2	99.5	93.3	107.9	214.0	140.9	130.4	137.9	140.3	158.9	232.7	184.4
Dried, salted or smoked fish	43.9	40.7	37.6	33.9	46.0	44.0	44.8	44.9	58.6	53.3	41.3	49.9	36.9
Crustacea and molluscs, fresh, frozen, dried, salted, etc.	35.1	39.2	53.8	56.9	58.5	64.7	67.3	83.8	106.2	132.7	161.5	210.3	219.8
Fish products and preparations, whether or not in airtight containers	3.5	4.3	5.6	9.0	8.1	6.0	7.1	10.5	9.3	10.0	6.4	12.4	15.5
Crustacean and mollusc products and preparations, whether or not in airtight containers	10.2	9.2	9.6	10.7	11.3	12.5	12.7	12.0	15.3	15.3	23.7	33.1	28.0
Oils and fats, crude or refined, of aquatic animal origin	0.4	0.1	—	0.4	0.3	0.5	0.6	0.9	0.6	0.4	—	—	—
Meals, solubles and similar animal feedstuffs of aquatic animal origin	11.9	12.4	14.8	21.9	29.2	25.8	23.7	25.7	39.0	40.5	62.6	72.2	67.0
	Million cubic metres												
FOREST PRODUCTS													
Broadleaved logs	8.30	10.91	11.89	13.34	15.76	17.13	21.04	24.57	29.07	30.77	32.99	41.00	37.50
Sawn hardwood	0.94	1.10	1.45	1.48	1.50	1.59	2.07	2.33	2.52	2.48	3.07	4.09	3.00
Plywood	0.11	0.18	0.27	0.34	0.50	0.57	1.01	1.14	1.38	1.70	2.10	2.50	2.00
	Million metric tons												
China and other Asian centrally planned countries													
AGRICULTURAL PRODUCTS													
Maize	0.01	0.15	0.19	0.24	0.16	0.08	0.06	0.02	—	—	—	0.05	0.15
Rice (milled equivalent) [2]	0.79	1.21	1.33	1.24	1.92	2.04	2.06	2.17	1.94	2.28	2.44	3.57	3.28
Sugar (raw equivalent) [3]	0.90	0.90	1.18	1.21	1.38	0.96	0.93	0.70	0.50	0.66	0.65	0.63	0.63
Tea	0.04	0.04	0.05	0.05	0.06	0.05	0.06	0.06	0.05	0.05	0.05	0.05	0.05
Near East [16]													
AGRICULTURAL PRODUCTS													
Wheat and wheat flour (wheat equivalent)	0.30	0.24	0.26	0.09	0.10	0.12	0.24	0.07	0.04	0.03	0.63	0.60	0.02
Barley	0.79	0.54	0.29	0.47	0.19	0.07	0.15	0.36	0.23	0.02	0.14	0.02	0.01
Rice (milled equivalent) [2]	0.16	0.40	0.55	0.39	0.38	0.45	0.58	0.79	0.68	0.55	0.49	0.32	0.16
Potatoes	0.24	0.20	0.19	0.18	0.23	0.24	0.21	0.25	0.29	0.25	0.28	0.32	0.30
Pulses (dry)	0.18	0.18	0.20	0.31	0.14	0.18	0.13	0.14	0.11	0.12	0.14	0.17	0.15
Citrus fruit [4]	0.16	0.18	0.19	0.23	0.23	0.27	0.34	0.41	0.43	0.60	0.51	0.78	0.66
Dates	0.27	0.38	0.31	0.31	0.33	0.31	0.28	0.34	0.40	0.32	0.35	0.36	0.32
Oilseed cake and meal	0.43	0.50	0.54	0.59	0.62	0.61	0.70	0.70	0.70	0.58	0.75	0.55	0.41
Sheep, lambs and goats [6]	1.51	1.55	1.63	1.90	1.61	1.23	1.36	1.20	1.23	1.15	0.93	1.00	0.87
Cotton (lint)	0.70	0.84	0.80	0.84	1.00	0.90	0.87	0.86	1.09	1.10	1.05	1.10	0.83

See notes at end of table.

ANNEX TABLE 3. – VOLUME OF EXPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*concluded*)

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
						Thousand metric tons							
FISHERY PRODUCTS													
Fresh, chilled or frozen fish	8.9	9.5	10.9	14.7	13.5	9.8	9.8	9.7	10.4	8.1	8.2	12.9	13.1
Dried, salted or smoked fish	4.7	6.2	6.7	8.3	9.9	5.3	6.7	6.5	8.0	10.1	10.1	3.2	3.2
Crustacea and molluscs, fresh, frozen, dried, salted, etc.	5.1	4.0	3.5	3.6	2.8	4.6	4.9	4.8	2.9	5.4	4.7	5.9	8.0
Fish products and preparations, whether or not in airtight containers	0.6	0.6	0.3	0.4	0.7	0.8	0.8	0.5	0.6	0.9	0.8	1.0	1.0
Crustacean and mollusc products and preparations, whether or not in airtight containers	—	—	—	—	0.9	0.5	0.1	0.1	—	—	—	1.3	1.3
Oils and fats, crude or refined, of aquatic animal origin	0.1	0.1	0.3	0.3	0.1	0.1	—	0.5	0.3	—	1.0	0.9	0.9
						Million metric tons							
Africa [17]													
AGRICULTURAL PRODUCTS													
Wheat and wheat flour (wheat equivalent) [18]	0.19	0.25	0.18	0.30	0.13	0.08	0.09	0.09	0.15	0.06	0.08	0.08	0.04
Barley	0.04	0.28	0.35	0.03	0.07	0.01	—	0.13	0.24	0.01	—	0.07	—
Maize	0.62	0.45	0.23	0.24	0.34	0.73	0.84	0.62	0.27	0.35	0.54	0.51	0.26
Sugar (raw equivalent) [3]	1.13	1.20	1.23	1.31	1.30	1.28	1.40	1.40	1.43	1.26	1.45	1.57	1.41
Bananas	0.44	0.47	0.45	0.44	0.38	0.38	0.38	0.38	0.39	0.39	0.44	0.43	0.45
Citrus fruit [4]	0.65	0.68	0.75	0.69	0.69	0.70	0.75	0.79	0.78	0.71	0.77	0.88	0.72
Pulses (dry)	0.28	0.33	0.38	0.35	0.28	0.26	0.40	0.35	0.40	0.30	0.46	0.46	0.37
Groundnuts and oil (oil equivalent)	0.68	0.69	0.70	0.70	0.81	0.75	0.88	0.66	0.55	0.33	0.48	0.40	0.26
Palm kernels and oil (oil equivalent)	0.33	0.33	0.34	0.34	0.34	0.24	0.28	0.27	0.28	0.29	0.25	0.22	0.26
Palm oil	0.31	0.31	0.31	0.28	0.27	0.17	0.20	0.18	0.28	0.20	0.16	0.14	0.20
Oilseed cake and meal	0.52	0.53	0.65	0.67	0.71	0.81	0.82	0.82	0.81	0.66	0.90	0.71	0.58
Cattle [6]	1.21	1.33	1.30	1.26	1.23	1.25	1.30	1.30	1.38	1.42	1.52	1.52	1.48
Sheep, lambs and goats [6]	3.00	3.04	3.23	3.01	3.27	3.26	3.70	3.87	3.59	3.58	3.92	3.33	3.24
Coffee (green)	0.76	0.79	0.85	0.84	0.94	0.90	0.99	0.99	1.01	1.00	1.08	1.18	1.19
Cocoa beans	0.86	0.83	0.84	1.08	0.88	0.84	0.82	0.76	0.87	0.92	0.98	0.89	0.88
Wine	1.78	1.04	1.29	1.08	1.17	0.77	0.79	1.32	1.47	0.65	0.71	1.26	0.77
Tobacco (unmanufactured)	0.11	0.11	0.14	0.16	0.09	0.08	0.07	0.07	0.08	0.09	0.11	0.13	0.13
Cotton (lint)	0.20	0.28	0.29	0.29	0.32	0.34	0.33	0.36	0.45	0.41	0.39	0.41	0.33
Sisal	0.40	0.40	0.39	0.38	0.37	0.34	0.34	0.31	0.37	0.30	0.29	0.26	0.27
Rubber (natural)	0.15	0.15	0.16	0.16	0.18	0.17	0.18	0.19	0.21	0.21	0.20	0.20	0.19
						Thousand metric tons							
FISHERY PRODUCTS													
Fresh, chilled or frozen fish	36.2	33.5	17.8	17.2	19.2	17.1	19.4	18.6	30.7	41.9	50.8	93.2	105.9
Dried, salted or smoked fish	38.3	36.8	33.7	42.3	38.7	35.0	36.6	34.4	40.2	36.4	29.9	29.6	49.3
Crustacea and molluscs, fresh, frozen, dried, salted, etc.	2.9	2.9	3.5	3.8	3.3	5.2	6.6	7.8	9.7	11.5	13.9	22.3	22.9
Fish products and preparations, whether or not in airtight containers	59.4	56.3	63.0	37.6	56.7	52.7	61.8	62.3	60.0	69.4	60.4	83.2	81.1
Crustacean and mollusc products and preparations, whether or not in airtight containers	0.8	0.7	0.6	0.5	0.3	0.2	0.1	0.2	0.2	—	—	—	—
Oils and fats, crude or refined, of aquatic animal origin	7.6	8.3	12.7	6.5	11.1	13.1	14.9	16.6	16.9	11.7	24.9	32.0	17.9
Meals, solubles and similar animal feedstuffs of aquatic animal origin	49.6	49.0	77.1	77.2	92.8	63.5	83.6	121.1	91.5	76.6	150.7	143.2	92.7
						Million cubic metres							
FOREST PRODUCTS													
Broadleaved logs	4.48	5.17	6.06	5.64	5.60	5.61	6.46	7.84	6.85	6.99	7.17	8.24	6.50
Sawn hardwood	0.59	0.58	0.71	0.73	0.77	0.71	0.75	0.74	0.76	0.65	0.69	0.86	0.80

[1] Including the U.S.S.R. and eastern Europe, China and other Asian centrally planned countries. — [2] Including paddy converted at 65 %. — [3] Including refined sugar converted at 108.7 %. — [4] Oranges, mandarines and lemons. — [5] Excluding re-exports of copra from Malaysia, but including unrecorded shipment of copra from Indonesia and the Philippines to Malaysia. — [6] Million head. — [7] Beef and veal, mutton and lamb, pork, poultry meat. — [8] Excluding imports into Malaysia for re-export and exports from Hong Kong, but including unrecorded shipments from Indonesia to Malaysia. — [9] Million cubic metres. — [10] Linseed, sunflowerseed, olive oil, groundnut oil, coconut oil, palm oil, palm-kernel oil, soybean oil, sunflowerseed oil, castor oil, cottonseed oil, linseed oil. — [11] Groundnuts, soybeans, sunflowerseed, linseed, cottonseed, groundnut oil, coconut oil, soybean oil, linseed oil, castor oil, cottonseed oil. — [12] Excluding trade between the United States and its territories. — [13] Groundnuts, copra, palm kernels, soybeans, sunflowerseed, linseed, castor beans, cottonseed, olive oil, groundnut oil, coconut oil, palm oil, palm-kernel oil, sunflowerseed oil, linseed oil, castor oil, cottonseed oil. — [14] Excluding Japan, and China and other Asian centrally planned countries. — [15] Groundnuts, copra, palm kernels, soybeans, cottonseed, groundnut oil, coconut oil, palm oil, palm-kernel oil, soybean oil, cottonseed oil. — [16] Excluding Israel. — [17] Excluding South Africa. — [18] Including coarse ground flour.

ANNEX TABLE 4. — WORLD AVERAGE EXPORT UNIT VALUES OF SELECTED AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974

Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	U.S. dollars per metric ton												
Agricultural products													
Wheat	66	66	66	61	63	68	64	65	62	65	69	106	170
Wheat flour	85	85	86	86	89	86	85	85	86	92	93	135	212
Barley	57	57	57	63	69	67	64	58	53	60	58	94	135
Maize	51	55	56	58	58	56	52	55	60	63	63	91	124
Rice (milled)	122	124	124	125	134	157	173	158	129	121	134	225	377
Sugar (raw)	97	133	142	106	103	100	101	107	118	128	148	186	389
Apples	142	148	133	142	153	152	147	156	156	168	187	250	240
Bananas	78	75	83	92	91	92	86	88	83	83	88	93	99
Oranges	120	136	118	118	129	126	123	131	124	138	146	161	176
Raisins	275	277	332	340	337	326	322	327	334	301	362	710	915
Dates	126	105	109	106	104	110	125	120	108	123	150	173	195
Cottonseed	68	62	63	68	74	76	72	62	65	79	75	99	138
Copra	143	157	164	189	162	160	189	161	185	167	122	212	502
Palm kernels	118	134	136	165	147	126	159	136	147	139	112	177	357
Soybeans	95	101	101	107	114	109	103	98	103	115	126	216	246
Groundnuts (shelled)	172	168	175	192	186	172	157	189	207	229	248	338	472
Olive oil	561	798	548	622	625	660	694	637	668	685	781	1 118	1 685
Cottonseed oil	290	258	258	298	298	289	280	265	298	362	316	355	609
Coconut oil	222	255	278	307	262	262	316	273	306	288	211	357	925
Palm oil	196	189	202	237	203	193	146	144	222	227	189	252	529
Palm-kernel oil	215	217	240	296	261	241	321	267	298	302	243	332	789
Soybean oil	244	239	243	293	313	272	221	227	278	315	287	357	698
Groundnut oil	300	306	323	330	314	321	272	316	340	391	377	444	855
Cattle[1]	113	124	140	143	133	136	131	147	153	170	227	279	262
Pigs[1]	42	38	36	36	38	36	40	45	49	48	57	79	82
Beef and veal	523	561	680	756	761	755	782	814	910	1 070	1 260	1 638	1 695
Mutton and lamb	382	422	442	529	503	493	464	483	551	556	587	873	1 211
Poultry meat	649	660	669	683	704	640	642	679	673	669	754	1 054	1 039
Bacon, ham, salted pork	657	712	761	752	867	827	740	806	864	855	1 025	1 505	1 602
Beef (prepared or preserved)	914	900	953	973	1 042	1 022	1 025	1 060	1 113	1 205	1 300	1 713	1 797
Milk (condensed and evaporated)	305	311	343	342	338	325	305	310	312	358	430	485	556
Milk (skimmed dry)	276	276	280	373	385	398	336	367	352	481	604	670	836
Butter	773	826	879	914	848	791	739	752	729	980	1 221	994	1 314
Cheese, whole milk (cow)	685	698	745	816	835	849	831	894	936	1 070	1 249	1 453	1 706
Potatoes	69	60	50	62	68	64	54	69	74	67	71	114	110
Coffee (green)	651	645	834	803	772	715	756	723	940	829	918	1 147	1 301
Cocoa	452	483	499	381	406	542	604	781	762	618	569	851	1 344
Tea	1 101	1 127	1 106	1 073	1 047	1 036	944	883	933	930	954	962	1 111
Wine	184	219	219	231	232	262	273	256	262	305	351	458	479
Tobacco (unmanufactured)	1 149	1 251	1 191	1 195	1 267	1 280	1 266	1 308	1 295	1 279	1 392	1 497	1 709
Linseed	135	125	125	121	114	120	127	122	112	105	120	258	418
Linseed oil	230	200	208	201	188	176	210	213	213	197	194	314	918
Castor beans	109	111	116	107	107	117	145	126	116	121	156	377	337
Castor oil	276	256	249	210	245	321	333	259	265	325	452	949	814
Cotton	622	622	617	628	603	597	631	617	630	695	772	876	1 287
Jute	247	254	274	248	261	351	285	255	247	254	274	248	261
Kenaf	118	140	146	168	165	141	116	147	135	166	205	196	179
Sisal	198	297	287	182	163	136	121	129	117	115	151	327	731
Wool (greasy)	1 147	1 235	1 455	1 219	1 199	1 170	989	1 055	964	802	922	2 057	2 813
Rubber (natural)	403	443	388	342	353	281	250	293	339	295	258	454	612
Rubber (dry)	551	512	487	495	474	399	369	485	418	343	329	606	759

See notes at end of table.

ANNEX TABLE 4. — WORLD AVERAGE EXPORT UNIT VALUES OF SELECTED AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*concluded*)

Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	U.S. dollars per metric ton												
Fishery products													
Fresh, chilled or frozen fish	315	297	289	329	353	325	347	396	424	491	618	680	718
Dried, salted or smoked fish	345	361	391	427	455	470	456	468	517	633	778	1 007	1 273
Crustacea and molluscs, fresh, frozen, dried, salted, etc.	758	846	796	892	989	1 033	1 127	1 248	1 230	1 324	1 380	1 806	1 844
Fish products and preparations, whether or not in airtight containers	659	649	639	703	682	733	706	725	771	882	977	1 144	1 312
Crustacean and mollusc products and preparations, whether or not in airtight containers	1 146	1 211	1 283	1 319	1 469	1 453	1 486	1 579	1 672	1 869	1 889	2 278	2 715
Oils and fats, crude or refined, of aquatic animal origin	133	137	183	194	182	129	93	122	201	212	195	271	462
Meals, solubles and similar animal feedstuffs of aquatic animal origin	104	108	110	125	145	119	109	129	164	167	175	404	378
Forest products													
Fuelwood [2]	8	9	9	9	10	8	8	9	9	10	11	15	19
Charcoal	37	39	45	46	46	47	46	39	49	54	58	83	..
Coniferous logs [2]	20	16	17	18	18	19	21	22	24	24	26	44	50
Broadleaved logs [2]	24	25	24	24	23	24	25	25	23	24	25	38	47
Pulpwood [2]	12	11	11	12	11	11	11	11	12	14	13	15	19
Pitprops [2]	14	13	14	15	16	16	15	16	17	18	20	25	30
Sawn softwood [2]	36	36	37	39	39	38	39	43	44	47	50	73	88
Sawn hardwood [2]	61	61	61	63	63	62	64	65	67	68	80	95	126
Veneer sheets [2]	274	249	247	255	247	242	233	256	265	233	247	365	400
Plywood [2]	147	146	142	141	144	144	140	146	145	151	166	211	267
Particle board	56	55	56	58	59	59	58	63	67	66	76	98	119
Fibreboard, compressed	84	85	90	94	92	89	88	91	97	100	113	136	205
Mechanical wood pulp	66	65	65	69	69	68	69	70	77	79	78	97	169
Chemical wood pulp	117	117	126	129	123	123	120	127	149	155	154	180	307
Newsprint	128	126	127	125	127	130	132	135	141	147	151	168	229
Other printing and writing paper	234	227	235	236	243	246	245	243	255	266	277	307	397

[1] U.S. dollars per head. — [2] U.S. dollars per cubic metre.

ANNEX TABLE 5. — VOLUME OF IMPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974

Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
Western Europe													
	Million metric tons												
AGRICULTURAL PRODUCTS													
Wheat and wheat flour (wheat equivalent)	13.33	12.07	10.59	12.66	12.43	10.45	10.93	13.57	13.57	13.34	13.49	13.59	12.56
Barley	4.72	3.63	4.51	4.84	5.02	4.95	4.10	4.62	6.40	6.68	5.69	5.36	6.33
Maize	12.92	13.87	14.48	16.95	18.69	19.37	18.76	16.62	17.47	19.60	20.17	22.64	24.31
Oats	1.32	1.07	0.97	1.32	1.28	1.06	1.02	0.96	1.23	1.24	1.05	1.17	0.80
Rye	1.02	0.74	0.46	0.36	0.41	0.41	0.27	0.24	0.22	0.27	0.27	0.38	0.31
Millet and sorghum	2.88	2.04	2.19	2.74	3.21	2.43	1.49	0.84	1.36	1.93	0.89	1.53	3.07
Rice (milled equivalent) [1]	0.58	0.58	0.59	0.61	0.73	0.58	0.71	0.70	0.63	0.69	0.76	0.79	0.78
Sugar (raw equivalent) [2]	4.22	5.32	4.97	4.54	4.97	4.84	4.67	4.42	4.49	4.66	4.98	4.95	5.29
Potatoes	1.97	1.72	1.56	2.38	2.06	1.97	1.85	2.38	2.32	2.05	2.55	2.39	2.24
Pulses (dry)	0.61	0.68	0.66	1.03	1.00	0.83	0.97	1.17	0.94	0.89	1.10	1.10	0.78
Apples	1.22	0.95	1.13	1.35	1.28	1.24	1.30	1.34	1.27	1.41	1.64	1.46	1.59
Bananas	1.75	1.73	1.74	2.13	2.28	2.28	2.23	2.22	2.12	2.31	2.56	2.56	2.35
Citrus fruit [3]	2.98	2.71	3.30	3.22	3.31	3.19	3.14	3.43	3.61	3.43	3.68	3.76	3.59
Grapes (fresh)	0.43	0.37	0.44	0.49	0.48	0.49	0.48	0.51	0.51	0.55	0.46	0.50	0.53
Vegetable oils and oilseeds (oil equivalent) [4]	3.75	4.04	3.99	4.17	4.49	4.49	4.67	4.85	5.18	5.84	6.21	6.03	6.04
Oilseed cake and meal	5.67	5.90	6.17	7.00	8.08	7.48	7.44	8.05	9.10	9.82	10.37	11.04	9.90
Cattle [5]	1.49	2.02	2.03	2.03	2.04	2.56	2.99	3.33	3.29	3.53	3.93	3.31	2.69
Sheep, lambs and goats [5]	1.35	1.32	1.37	1.93	1.79	1.74	2.16	2.50	2.54	2.82	3.01	2.50	1.97
Pigs [5]	0.96	0.74	0.91	1.24	1.26	1.14	1.30	1.83	2.13	2.37	3.00	2.82	3.01
Meat (fresh, chilled and frozen) [6]	1.70	2.00	2.16	2.27	2.28	2.43	2.43	2.68	2.72	2.86	3.35	3.45	2.87
Butter	0.49	0.51	0.56	0.53	0.53	0.57	0.54	0.52	0.59	0.55	0.51	0.59	0.71
Cheese	0.39	0.42	0.43	0.46	0.47	0.48	0.50	0.50	0.54	0.58	0.60	0.63	0.64
Coffee (green)	1.05	1.12	1.19	1.18	1.25	1.29	1.39	1.48	1.50	1.51	1.61	1.67	1.64
Cocoa beans	0.56	0.56	0.54	0.59	0.60	0.55	0.54	0.55	0.53	0.55	0.60	0.58	0.57
Tea	0.29	0.29	0.29	0.30	0.28	0.32	0.34	0.28	0.32	0.31	0.29	0.30	0.31
Wine	2.55	1.95	2.09	1.91	2.17	1.66	1.68	1.99	2.49	2.05	2.62	3.01	2.42
Tobacco (unmanufactured)	0.52	0.52	0.54	0.53	0.52	0.56	0.54	0.57	0.58	0.63	0.65	0.68	0.66
Wool (actual weight)	0.88	0.87	0.81	0.80	0.80	0.73	0.79	0.83	0.78	0.73	0.77	0.57	0.50
Cotton (lint)	1.46	1.44	1.54	1.39	1.57	1.45	1.41	1.44	1.35	1.26	1.28	1.54	1.14
Sisal	0.39	0.40	0.38	0.38	0.39	0.34	0.37	0.36	0.34	0.33	0.31	0.33	0.29
Rubber (natural)	0.76	0.75	0.77	0.76	0.76	0.76	0.81	0.91	0.94	0.94	0.95	1.00	1.00
	Thousand metric tons												
FISHERY PRODUCTS													
Fresh, chilled or frozen fish	648.8	727.2	747.3	820.9	792.5	816.9	869.7	814.3	894.9	967.7	980.2	1 101.6	1 178.9
Dried, salted or smoked fish	203.2	200.6	188.9	196.9	202.3	211.8	198.0	195.4	211.5	210.1	232.1	184.6	182.9
Crustacea and molluscs, fresh, frozen, dried, salted, etc.	117.3	109.0	136.8	138.1	132.0	143.1	151.3	160.3	176.4	195.8	248.3	237.3	259.0
Fish products and preparations, whether or not in airtight containers	261.8	254.3	269.4	272.8	256.6	255.8	269.0	244.9	245.5	254.4	281.4	307.6	282.7
Crustacean and mollusc products and preparations, whether or not in airtight containers	17.6	21.8	28.1	31.6	34.0	31.7	34.5	35.7	42.5	43.5	43.6	54.1	52.7
Oils and fats, crude or refined, of aquatic animal origin	596.0	640.9	593.6	623.9	568.3	742.4	766.6	662.7	599.4	619.4	662.9	567.6	552.3
Meals, solubles and similar animal feedstuffs of aquatic animal origin	1165.6	1195.5	1496.2	1564.7	1469.5	1723.0	1997.1	2082.9	1904.2	1752.6	1 881.0	1 133.1	1 107.6
	Million metric tons												
FOREST PRODUCTS													
Pulpwood [7]	7.47	6.92	8.78	9.42	8.99	9.14	9.78	11.00	14.53	12.08	9.24	11.57	15.20
Coniferous logs [7]	2.25	2.44	2.23	2.25	2.52	2.51	2.53	2.38	2.52	2.25	2.78	4.30	4.73
Broadleaved logs [7]	5.51	6.08	6.76	6.21	6.41	6.30	7.00	8.34	7.78	8.19	9.00	10.77	8.98
Pitprops [7]	1.44	1.30	1.34	1.16	0.87	0.44	0.40	0.54	0.59	0.40	0.29	0.39	0.40
Sawn softwood [7]	20.22	21.68	24.25	23.57	21.85	22.09	23.66	23.88	24.40	23.54	25.47	28.30	24.28
Sawn hardwood [7]	1.91	2.20	2.48	2.60	2.67	2.65	3.10	3.36	3.54	3.43	3.99	5.62	4.15
Plywood and veneers [7]	0.98	1.10	1.33	1.40	1.38	1.65	1.88	2.01	2.25	2.19	2.53	3.22	2.50

See notes at end of table.

ANNEX TABLE 5. — VOLUME OF IMPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*continued*)

Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
FOREST PRODUCTS (*concluded*)						*Million metric tons*							
Fibreboard	0.76	0.81	0.89	0.84	0.77	0.83	0.87	0.90	0.83	0.84	0.89	0.91	0.78
Mechanical wood pulp	0.97	1.04	1.16	1.21	1.14	1.00	1.07	1.08	1.07	0.79	0.84	0.92	0.95
Chemical wood pulp	4.96	5.80	6.23	6.04	6.56	6.69	7.46	8.22	8.79	7.13	8.37	9.18	9.35
Newsprint	1.49	1.56	1.69	1.70	1.84	1.72	1.90	2.29	2.41	2.35	2.86	2.94	3.00
Other paper and paperboard	3.25	3.73	4.31	4.65	4.99	5.23	6.14	7.10	7.44	7.86	8.45	8.51	9.50
Eastern Europe and U.S.S.R.													
AGRICULTURAL PRODUCTS													
Wheat and wheat flour (wheat equivalent)	4.18	8.21	15.09	10.82	12.58	6.17	5.85	4.92	6.87	8.75	13.12	20.06	7.13
Barley	0.67	0.89	1.17	1.93	0.44	0.78	0.97	0.84	2.16	1.32	5.49	3.42	2.24
Maize	1.33	0.97	1.21	1.24	1.10	1.10	1.34	1.35	1.06	2.51	6.09	7.82	6.87
Rye	0.87	0.78	0.15	0.06	0.23	0.28	0.22	0.26	0.18	0.40	0.31	1.41	0.78
Rice (milled equivalent) [1]	0.55	0.50	0.63	0.50	0.59	0.65	0.51	0.57	0.55	0.61	0.50	0.42	0.46
Sugar (raw equivalent) [2]	3.42	1.91	2.18	2.96	2.53	3.23	2.67	2.06	4.34	2.87	2.84	3.58	2.95
Citrus fruit [3]	0.27	0.27	0.37	0.45	0.54	0.59	0.62	0.69	0.70	0.76	0.90	0.92	0.30
Vegetable oils and oilseeds (oil equivalent) [8]	0.39	0.42	0.51	0.48	0.51	0.50	0.52	0.50	0.50	0.56	0.58	0.67	0.54
Sheep, lambs and goats [5]	1.38	1.25	1.15	1.41	1.93	1.67	1.09	0.95	1.00	1.02	1.21	1.21	1.21
Meat (fresh, chilled and frozen) [6]	0.40	0.32	0.32	0.39	0.34	0.31	0.28	0.23	0.41	0.50	0.25	0.29	0.60
Coffee (green)	0.07	0.09	0.10	0.11	0.11	0.12	0.14	0.16	0.17	0.16	0.18	0.17	0.19
Cocoa beans	0.10	0.11	0.13	0.16	0.12	0.16	0.19	0.17	0.18	0.22	0.24	0.21	0.25
Wine	0.18	0.22	0.25	0.27	0.32	0.41	0.47	0.90	0.94	0.99	1.03	0.93	1.00
Tobacco (unmanufactured)	0.13	0.16	0.20	0.17	0.13	0.13	0.13	0.11	0.12	0.13	0.16	0.15	0.15
Cotton (lint)	0.66	0.71	0.68	0.71	0.74	0.68	0.70	0.67	0.87	0.80	0.74	0.71	0.75
Rubber (natural)	0.48	0.45	0.35	0.43	0.48	0.44	0.50	0.48	0.52	0.44	0.45	0.50	0.54
						Thousand metric tons							
FISHERY PRODUCTS													
Fresh, chilled or frozen fish	153.4	153.7	146.1	145.6	159.4	138.4	126.0	131.8	183.3	128.4	127.1	119.0	138.8
Dried, salted or smoked fish	51.6	56.4	45.8	26.8	19.7	20.9	24.0	15.9	13.5	31.2	19.8	18.1	17.9
Fish products and preparations, whether or not in airtight containers	31.1	26.0	27.6	23.8	21.4	26.4	38.0	31.0	29.8	30.3	26.6	27.3	24.9
Oils and fats, crude or refined, of aquatic animal origin	61.4	84.9	75.2	65.4	52.7	31.0	21.0	24.0	22.0	21.8	17.8	11.5	24.9
Meals, solubles and similar animal feedstuffs of aquatic animal origin	86.4	163.0	197.7	292.3	292.5	314.7	366.0	344.0	414.0	457.0	452.7	287.4	357.3
						Million metric tons							
FOREST PRODUCTS													
Sawn softwood [7]	2.32	2.32	2.41	2.66	2.55	2.65	2.86	2.81	3.10	3.30	3.00	2.90	4.00
Sawn hardwood [7]	0.40	0.36	0.43	0.43	0.44	0.48	0.46	0.42	0.40	0.39	0.37	0.36	0.35
Pulp and pulp products	0.77	0.79	0.95	1.15	1.30	1.55	1.34	1.95	2.35	2.32	2.35	2.64	3.20
North America													
AGRICULTURAL PRODUCTS													
Maize	0.92	0.61	0.55	0.49	0.54	0.76	0.81	0.69	0.55	0.25	0.45	0.82	1.32
Sugar (raw equivalent) [2,9]	4.98	4.83	3.98	4.37	4.62	5.18	5.39	5.29	5.72	5.73	5.66	5.71	6.14
Bananas	1.46	1.53	1.60	1.73	1.79	1.82	1.86	1.82	2.05	2.13	2.15	2.17	2.27
Citrus fruit [3]	0.20	0.22	0.25	0.23	0.23	0.24	0.26	0.26	0.26	0.26	0.28	0.28	0.28
Vegetable oils and oilseeds (oil equivalent) [8]	0.65	0.61	0.67	0.68	0.80	0.75	0.79	0.83	0.80	0.84	1.02	0.88	0.86
Cattle [5]	1.25	0.86	0.58	1.13	1.11	0.78	1.05	1.05	1.22	1.08	1.26	1.26	0.72
Meat (fresh, chilled and frozen) [6]	0.51	0.60	0.42	0.35	0.46	0.49	0.56	0.66	0.71	0.67	0.80	0.79	0.64
Coffee (green)	1.55	1.51	1.45	1.36	1.40	1.36	1.61	1.30	1.27	1.40	1.34	1.40	1.25
Cocoa beans	0.31	0.30	0.29	0.38	0.34	0.30	0.25	0.24	0.30	0.34	0.31	0.27	0.24
Wool (actual weight)	0.13	0.13	0.11	0.14	0.14	0.09	0.12	0.09	0.07	0.06	0.05	0.03	0.02
Rubber (natural)	0.47	0.43	0.50	0.51	0.49	0.52	0.60	0.65	0.62	0.68	0.68	0.73	0.76

See notes at end of table.

ANNEX TABLE 5. — VOLUME OF IMPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*continued*)

Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 Preliminary)
	Thousand metric tons												
FISHERY PRODUCTS													
Fresh, chilled or frozen fish	348.4	322.1	340.2	361.1	432.7	394.3	502.7	492.0	526.7	530.9	726.7	792.3	688.8
Dried, salted or smoked fish	37.7	36.5	36.0	35.8	38.4	32.8	33.2	30.3	38.0	33.8	32.1	32.6	30.8
Crustacea and molluscs, fresh, frozen, dried, salted, etc.	99.7	110.7	100.6	104.8	113.5	114.2	122.4	128.6	137.4	129.2	148.1	135.9	145.7
Fish products and preparations, whether or not in airtight containers	72.5	63.1	68.2	67.7	88.9	82.4	88.4	82.5	101.3	86.8	108.3	104.4	131.3
Crustacean and mollusc products and preparations, whether or not in airtight containers	14.3	15.5	22.3	23.2	21.5	24.9	26.2	26.3	27.8	23.9	31.0	31.9	32.7
Oils and fats, crude or refined, of aquatic animal origin	59.6	49.8	35.7	43.3	38.5	31.3	32.0	26.5	31.0	28.4	10.0	5.7	8.2
Meals, solubles, and similar animal feedstuffs of aquatic animal origin	234.7	350.6	406.9	250.3	410.1	595.3	779.9	326.8	227.8	257.0	356.8	62.6	62.3
	Million metric tons												
FOREST PRODUCTS													
Pulpwood [7]	3.39	3.08	1.85	1.83	1.98	1.86	1.65	1.64	1.37	1.06	1.10	0.90	1.30
Coniferous logs [7]	1.21	1.23	1.20	1.56	1.24	1.30	1.58	1.50	1.79	1.79	2.39	1.95	1.53
Broadleaved logs [7]	0.28	0.24	0.51	0.50	0.53	0.59	0.53	0.47	0.48	0.41	0.46	0.46	0.40
Sawn softwood [7]	11.15	12.11	11.73	11.73	11.39	11.69	13.98	14.06	13.86	17.38	21.52	21.75	18.05
Sawn hardwood [7]	0.97	0.97	1.00	1.08	1.26	1.20	1.09	1.36	1.01	1.12	1.43	1.73	1.40
Plywood [7]	0.66	0.73	0.90	0.97	1.16	1.19	1.75	2.04	1.90	2.42	3.12	2.55	2.75
Wood pulp	2.58	2.58	2.73	2.92	3.08	2.88	3.22	3.68	3.21	3.24	3.45	3.68	3.79
Newsprint	4.97	4.91	5.40	5.74	6.34	5.99	5.86	6.16	6.02	6.24	6.44	6.72	6.63
Other paper and paperboard	0.30	0.28	0.31	0.33	0.42	0.41	0.43	0.48	0.56	0.62	0.70	0.82	1.00
Oceania													
AGRICULTURAL PRODUCTS													
Wheat and wheat flour (wheat equivalent)	0.19	0.18	0.18	0.17	0.15	0.10	0.05	0.01	0.02	0.08	0.05	—	0.05
Sugar (raw equivalent) [2]	0.12	0.13	0.13	0.11	0.13	0.13	0.15	0.15	0.14	0.16	0.18	0.14	0.11
Rubber (natural)	0.03	0.04	0.04	0.05	0.04	0.05	0.05	0.05	0.05	0.04	0.05	0.06	0.09
	Thousand metric tons												
FISHERY PRODUCTS													
Fresh, chilled or frozen fish	14.4	5.1	19.1	21.0	28.0	27.0	27.0	33.0	32.0	39.7	22.2	17.8	22.3
Dried, salted or smoked fish	5.0	5.0	4.9	4.0	5.0	3.0	4.0	5.0	4.0	4.6	4.3	2.9	5.3
Crustacea and molluscs, fresh, frozen, dried, salted, etc.	0.5	0.5	1.0	1.2	1.0	1.0	1.0	1.0	1.0	1.6	1.1	1.5	1.1
Fish products and preparations, whether or not in airtight containers	19.1	18.8	27.4	24.5	25.1	27.0	27.0	27.0	28.0	29.0	14.7	24.6	27.2
Crustacean and mollusc products and preparations, whether or not in airtight containers	0.3	0.3	0.6	0.7	2.0	2.0	2.0	2.0	3.0	2.5	3.0	4.2	5.5
Oils and fats, crude or refined, of aquatic animal origin	3.3	2.9	3.9	7.3	8.0	4.0	5.0	4.0	4.0	4.8	1.1	1.2	1.3
Meals, solubles and similar animal feedstuffs of aquatic animal origin	6.2	5.7	8.5	11.0	11.0	14.0	28.0	30.0	27.0	32.0	27.4	14.1	13.9
	Million metric tons												
FOREST PRODUCTS													
Sawn softwood [7]	0.60	0.58	0.73	0.69	0.72	0.70	0.69	0.77	0.72	0.73	0.74	0.79	0.75
Newsprint	0.20	0.22	0.26	0.29	0.28	0.28	0.30	0.30	0.28	0.29	0.22	0.27	0.27
Other paper and paperboard	0.15	0.17	0.17	0.18	0.17	0.18	0.20	0.21	0.25	0.27	0.30	0.44	0.45

See notes at end of table.

ANNEX TABLE 5. — VOLUME OF IMPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*continued*)

Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	Million metric tons												
Latin America													
AGRICULTURAL PRODUCTS													
Wheat and wheat flour (wheat equivalent)	4.90	5.15	5.72	5.13	6.08	6.38	6.75	6.65	5.66	6.35	7.03	9.24	8.30
Maize	0.37	0.65	0.67	0.40	0.42	0.37	0.64	0.67	1.52	0.94	0.96	2.70	2.83
Rice (milled equivalent) [1]	0.33	0.34	0.50	0.56	0.35	0.36	0.39	0.39	0.40	0.49	0.42	0.49	0.58
Sugar (raw equivalent) [2]	0.23	0.28	0.22	0.27	0.31	0.26	0.18	0.41	0.18	0.22	0.36	0.40	0.40
Bananas	0.24	0.24	0.24	0.25	0.25	0.23	0.24	0.29	0.30	0.25	0.22	0.23	0.22
Pulses (dry)	0.13	0.16	0.19	0.16	0.19	0.21	0.21	0.21	0.23	0.21	0.22	0.24	0.24
Cattle [5]	0.67	0.66	0.57	0.53	0.56	0.61	0.54	0.57	0.55	0.59	0.59	0.59	0.63
Sheep, lambs and goats [5]	0.11	0.28	0.15	0.07	0.09	0.11	0.14	0.13	0.13	0.19	0.13	0.07	0.20
Milk (condensed, evaporated and powdered)	0.27	0.30	0.30	0.28	0.25	0.30	0.31	0.29	0.34	0.37	0.35	0.36	0.45
Rubber (natural)	0.08	0.08	0.09	0.08	0.09	0.08	0.09	0.10	0.11	0.12	0.16	0.14	0.14
	Thousand metric tons												
FISHERY PRODUCTS													
Fresh, chilled or frozen fish	3.1	16.4	16.4	20.0	16.3	22.7	28.3	31.0	26.4	42.3	39.9	53.9	54.5
Dried, salted or smoked fish	68.5	78.2	81.1	59.6	81.6	90.2	90.8	102.0	96.7	82.0	68.7	73.5	70.4
Crustacea and molluscs, fresh, frozen, dried, salted, etc.	0.8	0.9	1.0	1.4	3.5	4.8	6.5	8.0	8.5	8.1	6.7	9.4	9.7
Fish products and preparations, whether or not in airtight containers	21.8	20.7	25.9	22.8	28.1	24.6	22.6	25.4	25.0	28.9	40.0	34.8	30.6
Crustacean and mollusc products and preparations, whether or not in airtight containers	0.5	0.5	0.6	1.4	1.5	1.1	0.8	0.7	0.4	1.3	1.0	1.9	2.1
Oils and fats, crude or refined, of aquatic animal origin	2.3	7.5	13.5	18.3	32.5	19.7	37.3	41.9	27.0	29.0	14.5	28.5	23.5
Meals, solubles and similar animal feedstuffs of aquatic animal origin	48.5	53.8	72.7	77.1	91.9	104.7	137.1	134.2	160.0	220.7	174.0	96.6	115.2
	Million metric tons												
FOREST PRODUCTS													
Broadleaved logs [7]	0.23	0.22	0.25	0.37	0.35	0.31	0.23	0.21	0.22	0.20	0.19	0.22	0.20
Sawn softwood [7]	1.09	0.99	1.23	1.43	1.51	1.36	1.60	1.59	1.56	1.58	1.40	1.40	1.40
Wood pulp	0.38	0.41	0.49	0.50	0.54	0.49	0.62	0.63	0.70	0.61	0.61	0.75	0.80
Newsprint	0.58	0.54	0.56	0.60	0.66	0.67	0.76	0.85	0.87	0.72	0.72	0.74	0.75
Other paper and paperboard	0.28	0.29	0.44	0.43	0.57	0.63	0.82	0.80	1.06	0.97	0.97	1.05	1.00
Far East [10]													
AGRICULTURAL PRODUCTS													
Wheat and wheat flour (wheat equivalent)	6.00	8.21	9.22	10.75	11.52	11.34	10.77	8.35	8.90	7.79	6.92	11.91	11.62
Barley	0.09	0.21	0.20	0.11	0.01	0.01	0.16	0.12	0.04	0.08	0.36	0.50	0.51
Maize	0.47	0.54	0.51	0.51	0.51	0.75	0.60	0.85	0.86	1.04	1.28	1.35	1.26
Millet and sorghum	—	—	0.02	0.07	1.59	2.16	0.43	0.41	0.07	0.08	0.10	1.31	1.02
Rice (milled equivalent) [1]	3.91	4.52	4.40	3.93	3.78	4.26	4.03	3.84	5.06	4.30	4.80	4.89	3.63
Sugar (raw equivalent) [2]	1.00	0.99	0.95	1.03	1.26	1.24	1.55	1.80	1.57	1.63	1.33	1.99	1.18
Dates	0.05	0.08	0.08	0.08	0.08	0.09	0.10	0.09	0.11	0.07	0.06	0.08	0.05
Vegetable oils and oilseeds (oil equivalent) [9]	0.44	0.47	0.56	0.47	0.47	0.43	0.43	0.56	0.62	0.80	0.73	0.80	0.85
Milk (condensed, evaporated and powdered)	0.43	0.43	0.43	0.41	0.41	0.36	0.40	0.44	0.40	0.38	0.36	0.33	0.39
Cotton (lint)	0.44	0.40	0.44	0.45	0.45	0.52	0.57	0.50	0.59	0.63	0.57	0.73	0.61
Jute and kenaf	0.09	0.06	0.07	0.16	0.10	0.03	0.08	0.03	0.01	0.14	0.25	0.18	0.21
Rubber (natural) [11]	0.13	0.12	0.10	0.10	0.10	0.12	0.11	0.13	0.09	0.09	0.09	0.09	0.10

See notes at end of table.

ANNEX TABLE 5. — VOLUME OF IMPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*continued*)

Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	Thousand metric tons												
FISHERY PRODUCTS													
Fresh, chilled or frozen fish	89.1	97.8	107.7	109.4	115.6	113.9	110.9	102.0	121.8	116.5	121.1	140.7	136.9
Dried, salted or smoked fish	57.5	64.4	62.0	55.8	72.0	57.8	62.7	60.9	61.1	61.8	62.0	27.8	24.0
Crustacea and molluscs, fresh, frozen, dried, salted, etc.	34.2	43.3	42.0	39.5	42.5	40.3	36.6	35.9	43.9	50.9	52.0	55.6	54.7
Fish products and preparations, whether or not in airtight containers	62.9	67.8	67.1	64.2	73.8	82.4	92.9	102.2	89.5	97.0	83.6	88.9	87.9
Crustacean and mollusc products and preparations, whether or not in airtight containers	17.9	20.1	17.2	17.1	12.6	21.8	23.9	22.6	27.8	16.0	15.5	15.4	20.1
Oils and fats, crude or refined, of aquatic animal origin	1.9	1.8	1.6	1.6	2.1	5.2	5.9	6.9	8.6	7.4	4.7	6.2	1.9
Meals, solubles and similar animal feedstuffs of aquatic animal origin	44.3	42.7	49.2	52.8	55.8	70.9	86.2	112.0	119.5	125.9	87.2	58.1	55.8
	Million metric tons												
FOREST PRODUCTS													
Coniferous logs [7]	0.11	0.19	0.23	0.14	0.25	0.31	0.48	0.23	0.29	0.44	0.57	1.08	1.10
Broadleaved logs [7]	1.04	0.93	1.74	2.05	2.82	3.10	4.28	4.46	5.16	5.74	5.72	5.98	5.30
Sawn hardwood [7]	0.12	0.12	0.35	0.30	0.37	0.40	0.65	0.47	0.47	0.48	0.56	1.20	1.05
Wood pulp	0.24	0.26	0.23	0.19	0.23	0.22	0.31	0.37	0.36	0.38	0.48	0.49	0.50
Newsprint	0.24	0.26	0.26	0.27	0.34	0.32	0.40	0.46	0.43	0.55	0.45	0.43	0.43
Other paper and paperboard	0.35	0.39	0.47	0.45	0.53	0.59	0.67	0.72	0.76	0.86	0.74	0.88	1.00
China and other Asian centrally planned countries													
AGRICULTURAL PRODUCTS													
Wheat and wheat flour (wheat equivalent)	5.18	4.92	6.02	5.86	7.13	4.22	6.14	4.52	6.62	4.66	6.28	7.26	7.60
Barley	0.50	0.03	0.58	0.03	—	0.03	0.05	0.09	0.24	0.32	0.46	0.28	0.19
Maize	0.52	0.05	0.41	0.23	0.09	0.27	0.38	0.41	0.60	0.55	1.99	2.95	2.55
Millet and sorghum	0.04	0.01	0.03	—	—	—	—	—	—	0.03	0.04	0.01	0.11
Rice (milled equivalent) [1]	0.19	0.55	0.53	0.33	0.52	0.68	1.08	1.31	0.90	1.26	1.11	1.41	1.10
Sugar (raw equivalent) [2]	0.97	0.56	0.46	0.53	0.68	0.74	0.65	0.73	0.79	0.79	0.99	1.00	0.92
Dates	0.06	0.07	0.06	0.04	0.06	0.06	0.06	0.06	0.06	0.06	0.09	0.09	0.10
Vegetable oils and oilseeds (oil equivalent) [4]	0.05	0.06	0.08	0.07	0.05	0.10	0.12	0.14	0.15	0.14	0.21	0.32	0.29
Milk (condensed, evaporated and powdered)	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.02	0.02	0.02	0.02	0.02	0.03
Cotton (lint)	0.13	0.22	0.17	0.25	0.19	0.19	0.17	0.20	0.21	0.27	0.32	0.58	0.63
Jute and kenaf	0.02	0.03	0.06	0.06	0.06	0.07	0.06	0.05	0.05	0.05	0.05	0.09	0.10
Rubber (natural, dry)	0.10	0.13	0.15	0.16	0.18	0.16	0.24	0.30	0.21	0.20	0.22	0.30	0.24
Near East [12]													
AGRICULTURAL PRODUCTS													
Wheat and wheat flour (wheat equivalent)	3.57	4.24	3.44	4.44	4.41	4.63	4.59	3.40	4.98	7.83	4.82	5.45	7.04
Maize	0.33	0.28	0.53	0.25	0.31	0.34	0.35	0.20	0.26	0.32	0.46	0.43	0.72
Rice (milled equivalent) [1]	0.37	0.28	0.36	0.38	0.38	0.32	0.35	0.38	0.45	0.61	0.51	0.47	0.72
Sugar (raw equivalent) [2]	1.13	0.88	1.28	1.83	1.54	1.37	1.10	1.00	1.05	1.28	1.21	1.64	1.73
Dates	0.06	0.07	0.08	0.06	0.05	0.07	0.06	0.06	0.07	0.11	0.08	0.10	0.07
Vegetable oils and oilseeds (oil equivalent) [8]	0.26	0.30	0.31	0.23	0.24	0.28	0.28	0.28	0.29	0.29	0.30	0.27	0.32
Sheep, lambs and goats [5]	2.72	2.68	2.94	3.00	3.41	2.23	4.00	3.82	3.77	3.94	4.31	3.97	3.90

See notes at end of table.

ANNEX TABLE 5. — VOLUME OF IMPORTS OF MAJOR AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*concluded*)

Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	Thousand metric tons												
FISHERY PRODUCTS													
Fresh, chilled or frozen fish	6.5	6.9	8.5	13.7	23.8	21.5	13.6	9.0	8.0	8.6	8.3	11.9	23.7
Dried, salted or smoked fish	2.8	2.1	2.9	2.9	8.8	2.8	3.5	2.4	2.2	2.0	1.8	1.8	1.7
Crustacea and molluscs, fresh, frozen, dried, salted, etc.	0.1	0.2	0.1	0.2	0.2	0.4	0.4	0.3	0.4	0.5	0.6	0.5	0.5
Fish products and preparations, whether or not in airtight containers	10.9	9.1	9.0	6.9	5.5	7.7	8.6	9.2	12.7	11.8	13.9	16.3	13.6
Oils and fats, crude or refined, of aquatic animal origin	0.7	0.6	0.4	0.8	0.9	0.5	0.3	1.8	1.0	1.5	1.4	—	—
Meals, solubles and similar animal feedstuffs of aquatic animal origin	—	—	—	—	2.5	5.2	4.5	7.8	5.4	6.8	6.0	1.8	1.9
	Million metric tons												
FOREST PRODUCTS													
Sawn softwood [7]	0.83	0.84	1.02	1.06	1.24	1.05	0.90	0.93	1.22	1.19	1.60	1.54	1.54
All paper and paperboard	0.28	0.28	0.27	0.31	0.37	0.46	0.46	0.52	0.49	0.62	0.53	0.64	0.65
Africa [13]													
AGRICULTURAL PRODUCTS													
Wheat and wheat flour (wheat equivalent)	2.04	1.56	1.57	1.74	2.53	3.07	2.78	2.18	2.85	3.43	3.79	4.51	4.75
Barley	0.24	0.01	0.02	0.08	0.09	0.12	0.05	0.07	0.02	0.03	0.08	0.10	0.10
Rice (milled equivalent) [1]	0.54	0.52	0.62	0.74	0.71	0.59	0.60	0.62	0.70	0.84	0.79	0.89	1.07
Sugar (raw equivalent) [2]	1.32	1.11	1.17	1.24	1.33	1.30	1.24	0.98	1.27	1.38	1.39	1.42	1.44
Potatoes	0.25	0.21	0.20	0.17	0.16	0.13	0.15	0.15	0.16	0.15	0.13	0.19	0.19
Cattle [5]	0.85	0.91	0.90	0.89	0.88	0.85	0.83	0.93	0.92	0.90	0.84	0.78	0.63
Sheep, lambs and goats [6]	2.49	2.64	2.35	2.25	2.44	2.41	2.41	2.45	2.42	2.47	2.27	2.00	1.93
Wine	0.22	0.23	0.25	0.25	0.27	0.25	0.26	0.24	0.22	0.20	0.19	0.17	0.19
	Thousand metric tons												
FISHERY PRODUCTS													
Fresh, chilled or frozen fish	55.7	72.8	62.8	65.9	81.6	58.1	56.8	62.0	79.5	98.3	94.5	211.7	214.6
Dried, salted or smoked fish	97.0	101.0	91.8	85.8	97.3	85.9	71.6	62.1	63.4	62.4	48.9	51.1	53.3
Crustacea and molluscs, fresh, frozen, dried, salted, etc.	1.9	1.2	2.1	0.7	0.8	0.7	0.6	1.5	1.0	0.9	1.0	2.1	2.4
Fish products and preparations, whether or not in airtight containers	31.3	31.1	29.6	33.8	32.8	26.7	29.9	30.8	37.2	43.2	52.5	64.3	64.8
Crustacean and mollusc products and preparations, whether or not in airtight containers	0.1	—	0.1	0.1	—	0.8	0.8	0.4	0.4	0.6	0.8	—	—
Oils and fats, crude or refined, of aquatic animal origin	1.9	1.7	2.3	1.7	0.8	0.8	1.7	3.6	4.8	4.8	4.7	3.8	3.1
Meals, solubles and similar animal feedstuffs of aquatic animal origin	7.6	8.7	6.2	9.4	10.1	11.5	11.0	15.0	15.0	16.1	16.0	14.5	13.4
	Million metric tons												
FOREST PRODUCTS													
Sawn softwood [7]	0.44	0.44	0.55	0.48	0.54	0.57	0.63	0.71	0.91	0.94	0.95	0.96	0.90
Sawn hardwood [7]	0.12	0.13	0.12	0.17	0.19	0.17	0.18	0.17	0.18	0.18	0.24	0.21	0.20
Newsprint	0.05	0.05	0.03	0.04	0.05	0.04	0.03	0.03	0.04	0.05	0.05	0.05	0.05
Other paper and paperboard	0.15	0.18	0.21	0.23	0.24	0.26	0.28	0.31	0.37	0.38	0.38	0.38	0.40

[1] Including paddy converted at 65%. — [2] Including refined sugar converted at 108.7%. — [3] Oranges, mandarines and lemons. — [4] Groundnuts, copra, palm kernels, soybeans, sunflowerseed, castor beans, cottonseed, olive oil, groundnut oil, coconut oil, palm oil, palm-kernel oil, soybean oil, sunflowerseed oil, castor oil, cottonseed oil. — [5] Million head. — [6] Beef and veal, mutton and lamb, pork, poultry meat. — [7] Million cubic metres. — [8] Groundnuts, copra, palm kernels, soybeans, sunflowerseed, castor beans, linseed, cottonseed, olive oil, groundnut oil, coconut oil, palm oil, palm-kernel oil, soybean oil, sunflowerseed oil, castor oil, linseed oil, cottonseed oil. — [9] Excluding trade between the United States and its territories. — [10] Excluding Japan, and China and other Asian centrally planned countries. — [11] Excluding imports into Malaysia for re-export. — [12] Excluding Israel. — [13] Excluding South Africa.

ANNEX TABLE 6. — INDICES OF VALUE OF EXPORTS OF AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	1961-65 average = 100												
Western Europe													
Agricultural products	88	100	109	118	122	131	135	156	179	207	259	369	433
Food	87	99	109	120	123	133	140	163	186	216	266	375	451
Feed	90	96	109	119	136	141	136	153	189	227	290	701	720
Raw materials	91	111	107	104	106	104	94	93	100	96	121	170	212
Fishery products	92	94	105	127	133	131	127	143	171	198	243	343	379
Forest products	90	96	109	114	118	119	129	149	169	177	205	301	409
Eastern Europe and U.S.S.R.													
Agricultural products	102	106	94	100	112	137	132	136	128	142	154	203	258
Food	106	109	90	97	109	141	130	143	130	147	152	208	264
Feed	150	110	31	59	130	130	108	117	13	19	5	13	5
Raw materials	90	95	107	112	117	121	127	103	113	115	145	171	223
Fishery products	84	104	105	126	148	156	175	179	197	202	221	284	360
Forest products	89	94	112	125	132	131	139	150	169	176	197	261	277
North America													
Agricultural products	87	98	116	110	123	110	105	97	123	135	160	298	378
Food	87	100	117	114	128	110	104	95	125	135	165	318	404
Feed	77	104	118	160	185	186	203	227	275	312	337	735	721
Raw materials	86	93	109	93	96	98	99	87	94	113	121	170	238
Fishery products	84	98	116	122	130	137	140	164	178	195	230	375	332
Forest products	90	97	110	116	125	131	151	169	186	189	227	299	344
Oceania													
Agricultural products	92	95	120	110	106	110	100	105	118	118	144	213	256
Food	91	93	117	119	110	121	114	114	138	158	199	246	308
Feed	100	116	136	88	49	103	105	142	198	152	154	420	418
Raw materials	93	97	122	101	101	96	83	95	93	72	82	174	195
Fishery products	96	92	101	133	166	174	237	286	294	406	527	617	580
Forest products	81	105	116	117	119	146	181	210	242	290	360	554	554
DEVELOPED COUNTRIES[1]													
Agricultural products	91	100	111	111	118	120	118	123	141	157	189	293	358
Food	91	100	111	114	121	124	122	129	150	170	205	314	390
Feed	89	102	108	135	159	163	170	191	220	253	289	644	646
Raw materials	91	98	112	100	102	100	99	92	96	94	109	169	211
Latin America													
Agricultural products	91	99	106	111	113	108	113	121	137	132	157	226	284
Food	88	98	109	113	116	114	118	124	147	142	168	236	310
Feed	97	108	97	118	124	119	118	127	162	189	233	527	397
Raw materials	103	104	97	102	99	82	90	105	92	83	100	141	161
Fishery products	96	98	115	125	145	142	161	169	228	249	225	201	255
Forest products	85	82	109	127	143	137	173	209	214	232	261	365	376

See notes at end of table.

ANNEX TABLE 6. — INDICES OF VALUE OF EXPORTS OF AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*concluded*)

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	1961-65 average = 100												
Far East[3]													
Agricultural products	95	104	104	101	100	94	94	100	103	105	112	160	236
Food	91	107	107	102	100	98	97	91	102	112	115	146	265
Feed	94	114	117	110	107	91	94	79	108	108	120	268	254
Raw materials	101	99	98	99	100	88	89	115	104	96	107	172	195
Fishery products	87	101	118	123	146	166	184	231	284	349	479	770	790
Forest products	82	105	113	126	149	169	227	257	291	326	384	715	728
Near East													
Agricultural products	94	103	104	111	115	113	116	126	134	146	165	220	252
Food	103	102	106	113	105	111	122	147	128	134	167	239	248
Feed	85	105	116	130	138	142	138	138	158	136	185	204	169
Raw materials	90	104	103	109	118	112	113	114	135	152	162	210	257
Fishery products	91	92	103	122	129	139	144	114	156	169	211	268	296
Forest products	87	92	94	141	169	170	205	224	269	275	359	456	516
Africa[4]													
Agricultural products	93	99	109	107	106	102	110	115	128	117	134	171	222
Food	92	100	110	109	112	110	122	125	138	129	147	182	243
Feed	85	90	111	127	125	146	150	139	155	121	162	229	184
Raw materials	86	106	108	104	87	80	78	85	97	98	104	140	187
Fishery products	102	96	106	95	117	111	120	137	154	173	204	373	388
Forest products	81	101	120	114	113	114	130	158	147	143	180	322	338
DEVELOPING COUNTRIES[5]													
Agricultural products	92	101	107	108	110	106	110	116	126	125	142	199	260
Food	89	101	110	111	113	112	117	120	133	133	152	205	286
Feed	93	107	108	118	120	116	117	114	142	145	178	357	291
Raw materials	97	102	100	103	103	91	94	110	107	106	120	173	201
World													
Agricultural products	91	100	109	110	114	114	114	120	134	143	169	251	315
Food	90	100	110	112	118	119	120	125	143	154	182	268	346
Feed	91	104	108	126	138	139	142	151	179	197	231	493	460
Raw materials	94	100	106	101	102	96	95	101	102	100	115	171	206
Fishery products[6]	95	96	109	121	131	131	137	151	179	206	248	331	364
Forest products	89	97	110	117	126	130	141	164	185	187	211	276	390

[1] Including eastern Europe and U.S.S.R. — [2] Excluding Japan, and China and other Asian centrally planned countries. — [3] Excluding Israel. — [4] Excluding South Africa. [5] Including Asian centrally planned countries. — [6] Excluding eastern Europe and the U.S.S.R., China and other Asian centrally planned countries.

ANNEX TABLE 7. — INDICES OF VOLUME OF EXPORTS OF AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	1961-65 average = 100												
Western Europe													
Agricultural products	93	99	103	111	114	125	136	145	161	172	187	202	212
Food	93	98	104	113	114	127	141	151	168	177	188	206	218
Feed	91	93	107	111	120	129	129	144	170	194	230	293	318
Raw materials	96	105	100	104	106	109	105	102	103	102	120	115	124
Fishery products	97	97	103	112	113	119	116	116	118	117	132	135	126
Forest products	92	99	108	109	114	116	129	143	149	147	160	187	186
Eastern Europe and U.S.S.R.													
Agricultural products	106	98	89	104	116	142	140	141	124	132	126	133	143
Food	112	101	84	101	112	145	141	148	124	134	120	125	138
Feed	149	102	29	52	122	116	99	97	12	11	4	7	3
Raw materials	89	92	105	114	124	127	131	108	116	117	133	144	144
Fishery products	71	100	106	158	191	187	197	195	224	231	230	244	303
Forest products	89	98	113	121	130	132	139	148	159	155	161	176	171
North America													
Agricultural products	88	99	115	108	117	105	104	93	117	122	139	173	153
Food	88	100	116	112	122	104	102	92	121	122	146	183	156
Feed	81	101	116	156	165	165	186	208	247	270	256	313	313
Raw materials	86	95	111	91	95	100	101	83	87	101	100	122	122
Fishery products	88	103	114	113	116	116	122	130	124	133	135	142	114
Forest products	90	99	110	115	123	128	141	151	161	161	175	183	181
Oceania													
Agricultural products	98	98	108	106	103	108	111	114	124	128	136	131	109
Food	96	96	112	112	104	115	115	113	128	143	152	146	129
Feed	98	124	138	80	38	88	91	121	186	111	132	214	150
Raw materials	100	100	104	99	103	99	106	114	120	111	118	113	84
Fishery products	89	84	101	134	136	153	205	207	223	278	316	262	240
Forest products	81	104	121	116	122	157	201	230	252	260	274	295	295
DEVELOPED COUNTRIES [1]													
Agricultural products	94	99	106	108	112	116	119	118	132	139	151	168	160
Food	95	99	107	109	114	118	122	121	137	144	157	177	169
Feed	91	99	107	129	142	147	157	175	197	217	223	273	280
Raw materials	94	98	105	99	102	103	106	99	103	104	111	118	108
Latin America													
Agricultural products	101	100	96	107	110	109	111	117	121	114	118	125	116
Food	99	100	97	107	110	113	114	118	125	120	124	133	124
Feed	102	101	96	111	116	109	107	121	145	152	160	170	178
Raw materials	105	101	93	108	107	92	97	116	100	84	88	87	77
Fishery products	106	105	125	79	119	139	174	146	164	168	160	83	103
Forest products	86	83	107	124	138	135	163	170	174	181	212	252	252

See notes at end of table.

ANNEX TABLE 7. — INDICES OF VOLUME OF EXPORTS OF AGRICULTURAL, FISHERY AND FOREST PRODUCTS, 1962 TO 1974 (*concluded*)

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	1961-65 average = 100												
Far East [2]													
Agricultural products	97	105	104	101	102	99	102	105	108	116	122	125	123
Food	96	105	103	99	99	94	94	92	101	111	117	111	115
Feed	95	111	116	103	99	93	103	92	111	114	125	148	140
Raw materials	99	103	104	103	106	106	113	124	118	123	127	142	132
Fishery products	90	95	112	116	129	170	144	154	180	198	235	325	304
Forest products	79	100	118	129	154	169	222	253	293	318	361	450	420
Near East [3]													
Agricultural products	99	104	103	108	116	110	111	117	129	131	138	140	109
Food	104	103	104	110	94	94	104	124	110	113	126	132	98
Feed	90	103	115	121	123	130	142	143	153	126	153	108	84
Raw materials	96	104	102	106	127	117	113	111	136	140	142	144	115
Fishery products	101	95	90	109	121	99	95	94	101	107	102	150	169
Forest products	95	116	92	122	151	149	173	220	259	297	295	330	408
Africa [4]													
Agricultural products	98	98	103	107	105	98	105	105	110	101	111	113	105
Food	98	100	103	108	108	102	111	107	108	103	116	114	109
Feed	90	91	111	112	117	132	134	131	136	105	142	115	94
Raw materials	88	98	107	112	99	96	94	96	114	109	109	114	105
Fishery products	106	101	106	88	105	98	115	129	131	141	167	221	221
Forest products	85	98	116	113	113	112	127	145	134	132	140	158	155
DEVELOPING COUNTRIES [5]													
Agricultural products	98	101	102	107	110	107	109	113	116	115	122	127	119
Food	97	101	101	108	111	108	108	111	112	116	123	127	122
Feed	96	103	107	110	112	110	114	116	133	129	146	148	143
Raw materials	98	102	102	107	110	104	107	117	116	113	119	125	111
World													
Agricultural products	96	100	104	107	111	111	114	116	124	127	137	149	141
Food	96	100	104	109	113	114	117	117	128	132	142	155	148
Feed	94	101	107	119	126	128	135	145	166	174	187	212	215
Raw materials	96	100	103	103	105	103	106	108	109	109	115	121	110
Fishery products [6]	96	98	110	109	110	118	125	122	130	135	149	148	149
Forest products	90	99	110	115	126	128	141	159	166	162	176	194	202

[1] Including eastern Europe and the U.S.S.R. — [2] Excluding Japan, and China and other Asian centrally planned countries. — [3] Excluding Israel. — [4] Excluding South Africa. — [5] Including centrally planned countries. — [6] Excluding China and other Asian centrally planned countries.

ANNEX TABLE 8. — INDICES OF VALUE OF IMPORTS OF AGRICULTURAL AND FOREST PRODUCTS, 1962 TO 1974

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	1961-65 average = 100												
Western Europe													
Agricultural products	93	100	107	111	116	113	109	120	131	144	169	238	279
Food	91	100	108	116	121	120	116	128	143	161	189	258	313
Feed	96	103	108	123	143	134	130	138	164	186	207	421	359
Raw materials	98	101	105	95	98	90	88	96	91	87	103	144	164
Forest products	86	96	113	118	120	119	130	151	172	174	201	297	394
Eastern Europe and U.S.S.R.													
Agricultural products	86	94	116	116	114	103	104	105	131	135	164	243	289
Food	81	92	127	121	117	104	101	99	128	136	177	268	308
Feed	57	92	148	164	183	190	210	218	263	308	430	901	1 006
Raw materials	96	98	97	104	104	91	95	97	114	109	112	156	207
Forest products	95	92	104	119	121	141	156	171	199	216	225	270	312
North America													
Agricultural products	98	102	105	102	111	110	122	121	139	139	155	208	261
Food	98	103	105	102	113	114	128	127	150	153	168	222	283
Feed	104	113	100	103	108	103	105	123	145	132	158	263	270
Raw materials	101	99	103	99	98	88	88	90	77	68	77	113	145
Forest products	96	97	106	112	122	118	137	151	139	163	202	248	254
Oceania													
Agricultural products	83	99	114	108	106	99	92	101	112	114	117	135	223
Food	86	99	120	108	114	106	100	105	120	128	131	144	220
Feed	10	66	161	239	532	491	687	453	630	676	515	352	726
Raw materials	80	99	105	108	90	86	74	90	95	86	91	112	210
Forest products	83	98	101	115	107	110	118	129	148	155	137	194	194
DEVELOPED COUNTRIES[1]													
Agricultural products	92	100	109	111	116	113	113	121	136	145	170	243	292
Food	90	100	111	115	121	120	120	127	148	162	189	264	329
Feed	90	102	111	128	145	136	136	144	174	194	222	462	413
Raw materials	96	100	103	99	101	92	92	98	98	94	109	157	182
Latin America													
Agricultural products	93	101	114	107	113	116	120	124	132	149	168	261	391
Food	93	102	115	106	112	118	122	125	134	150	171	271	409
Feed	101	90	137	100	108	113	124	154	157	317	289	615	883
Raw materials	91	97	110	113	113	101	106	109	110	124	132	170	249
Forest products	91	87	105	113	127	124	153	168	192	192	201	225	229
Far East[2]													
Agricultural products	88	101	111	112	121	131	129	124	131	135	143	230	308
Food	86	102	114	113	126	136	130	124	130	129	134	231	318
Feed	96	110	94	108	86	90	101	132	158	183	203	254	398
Raw materials	98	94	97	109	102	116	128	129	135	161	176	221	268
Forest products	95	96	110	106	134	142	172	192	220	259	252	726	763

See notes at end of table.

ANNEX TABLE 8. — INDICES OF VALUE OF IMPORTS OF AGRICULTURAL AND FOREST PRODUCTS, 1962 TO 1974 (*concluded*)

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	1961-65 average = 100												
Near East [3]													
Agricultural products	88	99	112	115	120	115	114	109	130	179	179	241	464
Food	87	99	112	115	120	115	114	108	130	183	180	246	486
Feed	104	90	101	138	190	177	163	196	351	534	514	658	1 023
Raw materials	99	96	105	113	107	109	106	118	122	124	156	178	214
Forest products	101	84	99	117	133	125	127	143	163	191	236	310	315
Africa [4]													
Agricultural products	97	92	104	111	110	112	109	111	127	145	163	220	359
Food	98	92	103	110	110	111	106	109	126	145	163	224	372
Feed	62	83	124	183	172	189	228	314	362	338	540	540	540
Raw materials	77	82	124	131	131	142	149	142	161	189	223	273	402
Forest products	89	96	104	119	127	135	143	165	205	217	214	276	282
DEVELOPING COUNTRIES [5]													
Agricultural products	91	99	111	111	117	119	121	119	131	145	161	247	379
Food	91	99	113	110	119	120	122	118	131	144	159	249	393
Feed	96	100	109	112	108	116	123	154	187	265	265	416	609
Raw materials	91	98	105	115	107	112	116	125	127	147	166	237	316
World													
Agricultural products	92	100	109	111	116	114	115	120	135	145	168	244	310
Food	90	100	111	114	120	120	120	125	144	158	182	261	344
Feed	91	102	111	127	143	134	135	144	174	197	224	459	423
Raw materials	96	100	103	101	102	95	95	101	102	100	116	167	198
Forest products	89	96	110	117	125	128	139	159	180	183	202	259	348

[1] Including eastern Europe and U.S.S.R. — [2] Excluding Japan, and China and other Asian centrally planned countries. — [3] Excluding Israel. — [4] Excluding South Africa. — [5] Including centrally planned countries.

ANNEX TABLE 9. — INDICES OF VOLUME OF IMPORTS OF AGRICULTURAL AND FOREST PRODUCTS, 1962 TO 1974

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	1961-65 average = 100												
Western Europe													
Agricultural products	99	100	102	106	111	110	111	116	121	124	131	134	129
Food	97	100	103	109	113	115	116	121	126	132	140	143	141
Feed	99	101	106	116	131	125	126	137	153	164	173	185	167
Raw materials	101	100	101	98	101	97	99	103	101	97	102	99	88
Forest products	90	99	111	112	114	117	131	144	152	146	161	186	180
Eastern Europe and U.S.S.R.													
Agricultural products	89	94	113	114	113	101	104	105	127	132	155	175	148
Food	85	90	121	119	114	97	95	90	117	125	162	198	144
Feed	59	94	141	160	187	184	210	219	260	302	408	455	529
Raw materials	96	101	99	104	105	96	104	101	117	111	111	110	115
Forest products	94	91	105	120	129	150	166	181	205	208	205	212	216
North America													
Agricultural products	103	102	97	100	106	107	117	111	115	117	124	129	124
Food	105	104	96	98	106	108	119	112	118	120	125	129	124
Feed	105	108	103	96	92	87	87	108	114	104	111	111	122
Raw materials	99	95	100	104	102	99	109	101	91	89	100	99	97
Forest products	96	98	105	111	121	117	128	138	131	146	167	169	185
Oceania													
Agricultural products	90	99	104	107	108	103	100	107	113	114	121	116	137
Food	95	99	106	104	114	108	105	106	115	118	123	120	131
Feed	—	71	157	243	500	400	600	400	529	557	414	200	457
Raw materials	83	99	100	110	96	93	90	103	106	103	113	106	138
Forest products	82	93	100	112	106	110	114	120	132	135	132	162	162
DEVELOPED COUNTRIES[1]													
Agricultural products	97	99	103	107	112	110	113	116	124	127	137	144	134
Food	96	99	104	110	114	113	117	119	128	133	145	154	145
Feed	94	101	109	120	134	126	131	143	162	172	189	208	194
Raw materials	98	100	101	101	103	100	104	105	107	103	109	108	98
Latin America													
Agricultural products	95	102	110	103	110	113	122	124	128	138	145	170	185
Food	96	102	110	102	110	113	122	123	128	136	143	174	187
Feed	100	83	130	101	101	107	117	148	161	293	261	245	379
Raw materials	91	97	110	111	114	109	123	122	119	134	140	136	153
Forest products	90	86	107	113	129	130	160	166	193	180	185	179	179
Far East[2]													
Agricultural products	90	101	107	111	118	124	124	120	125	124	123	150	139
Food	87	103	109	112	122	125	121	116	122	117	116	147	134
Feed	96	110	96	102	76	83	97	134	150	175	189	152	192
Raw materials	102	94	96	106	104	124	144	138	136	149	150	165	156
Forest products	89	96	117	112	141	148	183	191	202	238	241	267	266

See notes at end of table.

ANNEX TABLE 9. — INDICES OF VOLUME OF IMPORTS OF AGRICULTURAL AND FOREST PRODUCTS, 1962 TO 1974 (*concluded*)

Region / Product	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973	1974 (Preliminary)
	1961-65 average = 100												
Near East [3]													
Agricultural products	94	97	102	115	120	117	119	115	136	170	152	154	182
Food	94	98	102	114	120	116	117	113	134	171	147	154	183
Feed	114	92	103	122	156	147	156	186	314	442	419	325	403
Raw materials	98	97	104	118	118	129	137	135	147	149	187	148	157
Forest products	97	92	103	118	130	135	131	152	155	175	196	209	208
Africa [4]													
Agricultural products	102	93	99	105	111	114	114	110	124	135	138	143	156
Food	103	94	97	104	111	114	112	110	125	137	140	145	158
Feed	64	82	118	168	159	173	173	205	277	305	286	273	264
Raw materials	75	83	132	125	125	142	162	144	156	175	189	196	214
Forest products	89	95	105	115	121	128	136	149	178	184	175	190	191
DEVELOPING COUNTRIES [5]													
Agricultural products	94	99	106	108	116	117	122	119	129	136	140	162	166
Food	94	99	106	107	117	116	120	116	128	134	136	159	163
Feed	97	98	108	107	97	107	117	153	179	239	236	202	275
Raw materials	92	98	105	115	110	122	135	137	135	148	159	184	185
World													
Agricultural products	96	99	104	107	113	111	115	116	125	128	137	147	140
Food	96	99	105	109	115	114	117	118	128	133	142	155	149
Feed	94	101	108	119	132	125	130	143	163	176	191	207	198
Raw materials	97	100	101	103	104	102	107	109	110	109	116	118	109
Forest products	91	98	110	114	122	126	143	154	164	164	179	201	200

[1] Including eastern Europe and U.S.S.R. — [2] Excluding Japan, and China and other Asian centrally planned countries. — [3] Excluding Israel. — [4] Excluding South Africa. — [5] Including centrally planned countries.

ANNEX TABLE 10. — STOCKS OF SELECTED AGRICULTURAL PRODUCTS, 1961-65 AVERAGE AND 1967 TO 1975

Product / Country	Date	1961-65 average	1967	1968	1969	1970	1971	1972	1973	1974	1975 (Estimated)
		Million metric tons									
Wheat											
EXPORTING COUNTRIES											
United States	1 July	30.7	11.6	14.7	22.2	24.1	19.9	23.5	11.9	6.8	7.8
Canada	1 Aug.	13.3	15.7	18.1	23.2	27.5	20.0	16.0	9.9	10.3	8.5
Argentina	1 Dec.	1.5	0.2	1.0	0.3	0.8	0.7	0.5	0.1	1.0	0.3
Australia	1 Dec.	0.6	2.2	1.4	7.3	7.2	3.4	1.4	0.5	1.9	1.4
European Economic Community (1961-67, original members; 1958-74, nine member states)	1 Aug.	6.5	[1]5.4	9.2	9.1	5.5	6.1	7.5	[2]6.6	[2]5.8	7.0
TOTAL OF ABOVE		52.6	35.1	44.4	62.1	65.1	50.1	48.8	29.0	25.8	25.0
IMPORTING COUNTRIES											
India[3]	31 Dec.	...	0.8	2.1	2.3	3.1	5.0	1.9	1.0	...	...
Coarse grains[4]											
EXPORTING COUNTRIES											
United States[5]	1 July	62.7	34.2	44.4	46.0	44.6	30.9	45.1	30.2	20.4	12.2
Canada	1 Aug.	4.3	4.9	4.4	6.7	7.1	5.4	6.2	5.8	6.2	5.5
Argentina[6]	1 Dec.	0.4	0.6	1.8	1.7	1.8	—	[7]0.2	[7]0.1	[7]0.5	0.2
Australia	1 Dec.	0.2	0.9	0.8	1.2	1.2	1.6	1.0	0.5	0.5	0.5
TOTAL OF ABOVE		67.6	39.6	51.4	55.6	54.7	37.9	52.5	36.6	27.7	18.4
Rice (milled equivalent)											
EXPORTING COUNTRIES											
Pakistan[3]	31 Dec.	...	[8]0.02	0.19	0.24	[9]0.38	[9]0.26	[9]0.38	[9]0.10	0.37	...
Thailand[10]	31 Dec.	...	—	[8]0.06	[11]0.30	[12]1.10	0.89	...	...	...	...
United States[13]	31 July	0.25	0.28	0.22	0.54	0.55	0.62	0.38	0.17	0.26	...
Japan[7]	31 Oct.	—	—	—	9.36	9.50	7.03	5.22	3.71	3.09	3.39
TOTAL OF ABOVE		0.25	0.30	0.47	10.44	11.43	8.80	5.98	3.98	3.72	3.39
IMPORTING COUNTRIES											
India[3]	31 Dec.	...	...	1.03	1.64	1.83	2.31	1.36	1.42	1.05	...
Japan[7]	31 Oct.	3.19	5.85	7.03	—	—	—	—	—	...	...
TOTAL OF ABOVE		3.19	5.85	8.06	1.64	1.83	2.31	1.36	1.42	1.05	...
Butter											
Canada and United States		0.13	0.11	0.08	0.08	0.09	0.07	0.06	0.05	0.04	...
European Economic Community:											
original members[14]		0.09	0.20	0.33	0.34	0.16	0.13	0.34	} 0.29	0.21	...
new members		0.04	0.06	0.08	0.05	0.03	0.04	0.09		—	...
Other western Europe[15]		0.01	0.02	0.02	0.03	0.02	0.02	0.01	0.02	0.01	...
Australia and New Zealand		0.07	0.06	0.07	0.09	0.07	0.05	0.05	0.08	0.08	...
TOTAL OF ABOVE	31 Dec.	0.34	0.45	0.58	0.59	0.37	0.30	0.55	0.43	0.34	...
Dried skim milk											
United States		0.18	0.12	0.13	0.10	0.06	0.04	0.02	0.03	0.13	...
European Economic Community:											
original members[16]		...	0.20	0.31	0.39	0.18	0.10	0.19	} 0.33	0.47	...
new members		0.03	...	0.04	0.02	0.02	0.02	0.10			
TOTAL OF ABOVE	31 Dec.	0.21	0.32	0.48	0.51	0.26	0.16	0.31	0.36	0.60	...
Sugar (raw value)											
WORLD TOTAL	1 Sept.	14.1	19.1	20.6	19.3	21.4	19.1	17.2	15.8	15.7	15.9
Coffee											
EXPORTING COUNTRIES	End of crop season, mainly between 31 March and 30 Sept.	[17]4.30	5.00	4.73	4.15	3.55	2.90	2.70	2.69	2.12	...

[1] July until 1967 included (except Federal Republic of Germany, 1 June). — [2] Commercial stocks. — [3] Government (or official agency) stocks only. — [4] Barley, oats, maize, sorghum and rye. — [5] Maize and sorghum, 1 October. — [6] Maize, 1 April. — [7] Government stocks only. — [8] November. — [9] 31 October. — [10] Old crop for export. — [11] September. — [12] 31 January 1971. — [13] Including paddy converted to milled rice at 69.5%. — [14] Excluding Italy and Luxembourg. — [15] Finland, Norway, Sweden, Switzerland. — [16] Excluding Italy. — [17] 1963-65.

ANNEX TABLE 11. — ANNUAL CHANGES IN CONSUMER PRICES: ALL ITEMS AND FOOD, 1960-65 AND 1965-70 AVERAGES AND 1970-71 TO 1973-74

Region and country	All items						Food					
	1960 to 1965	1965 to 1970	1970 to 1971	1971 to 1972	1972 to 1973	1973 to 1974	1960 to 1965	1965 to 1970	1970 to 1971	1971 to 1972	1972 to 1973	1973 to 1974
	Percent per year											
Developed countries												
WESTERN EUROPE												
Austria	3.9	[1] 3.3	4.7	6.3	7.5	9.5	4.4	[1] 2.1	3.8	5.8	7.8	8.4
Belgium	2.5	3.5	4.4	5.4	7.0	12.7	2.9	3.5	1.9	6.9	8.0	9.4
Denmark	5.5	7.5	5.8	6.6	9.3	15.3	4.2	7.5	5.9	9.3	13.0	11.9
Finland	5.3	[2] 4.6	6.5	7.1	11.7	17.4	5.9	[2] 5.2	4.4	9.3	12.5	16.0
France	3.8	4.3	5.5	5.9	7.3	13.7	4.3	3.8	6.5	6.7	9.4	12.6
Germany, Fed. Rep. of	2.8	2.4	5.1	5.8	6.9	7.0	2.6	1.3	3.8	6.2	7.6	4.7
Greece	1.6	2.5	3.0	4.3	15.4	26.9	2.5	2.6	5.2	3.8	21.3	27.6
Iceland	11.0	12.8	6.4	10.3	20.1	10.8	15.2	13.3	2.0	16.6	27.9	46.8
Ireland	4.2	5.3	8.9	8.7	11.3	17.0	3.9	4.3	7.4	11.8	16.4	14.7
Italy	4.9	3.0	4.8	5.7	10.8	19.1	4.6	2.2	4.0	6.3	12.0	17.8
Netherlands	3.5	4.8	7.6	7.8	7.9	9.7	4.0	4.3	4.2	6.6	7.9	7.2
Norway	4.1	5.0	6.3	7.2	7.5	9.4	4.5	5.3	6.0	7.2	7.0	8.3
Portugal	2.6	6.4	12.0	10.7	12.9	25.1	2.8	5.2	8.9	9.9	9.2	32.6
Spain	7.0	5.1	8.3	8.3	11.4	15.7	7.7	3.7	7.8	9.1	12.6	14.3
Sweden	3.6	4.5	7.4	6.0	6.8	9.9	5.3	4.5	9.2	9.1	5.8	6.2
Switzerland	3.2	3.4	6.6	6.7	8.7	9.8	2.9	0.9	6.4	6.5	6.0	10.8
United Kingdom	3.6	4.6	9.5	7.1	9.2	15.9	3.6	4.6	11.1	8.8	15.1	18.0
Yugoslavia	13.6	10.5	15.6	18.4	21.4	21.1	17.3	9.0	16.6	23.1	25.9	15.8
NORTH AMERICA												
Canada	1.6	3.8	2.9	4.8	7.6	10.9	2.2	3.4	1.1	7.6	14.5	16.3
United States	1.3	4.2	4.3	3.3	6.2	11.0	1.4	4.0	3.0	1.3	14.5	14.3
OCEANIA												
Australia	1.8	3.1	6.0	5.9	9.4	15.1	2.0	2.1	3.9	3.8	15.2	15.3
New Zealand	2.7	4.1	10.4	6.9	8.2	11.1	2.4	4.1	9.1	4.8	11.3	11.6
OTHER DEVELOPED COUNTRIES												
Israel	7.1	4.0	12.0	8.7	19.9	39.8	5.6	3.1	13.6	12.9	20.7	44.4
Japan	6.0	5.4	6.1	4.5	11.7	24.5	7.2	6.1	6.0	3.8	13.0	27.7
South Africa	2.1	3.4	6.1	6.5	9.5	11.6	2.6	3.0	4.8	7.1	15.2	15.0
Developing countries												
LATIN AMERICA												
Argentina	23.0	19.4	34.7	58.5	60.3	24.2	23.0	18.3	41.7	63.1	55.1	15.1
Bolivia	5.1	5.9	3.7	6.5	31.5	62.9	2.1	7.8	4.0	6.3	35.0	81.6
Brazil	60.0	28.0	21.1	...	15.5	[3] 23.6	60.0	26.0	23.9	...	20.1	[3] 26.4
Chile	27.0	26.0	20.1	77.8	333.0	500.0	30.0	26.0	23.8	115.2	376.0	510.0
Colombia	12.4	10.1	7.1	14.3	22.8	24.5	13.4	9.2	7.5	19.2	31.9	27.1
Costa Rica	2.3	2.5	3.0	4.7	15.2	30.1	2.2	3.8	3.7	1.2	21.6	29.3
Dominican Republic	2.7	1.0	2.3	7.8	15.1	13.1	2.5	0.1	5.1	6.0	18.4	17.8
Ecuador	4.0	4.6	8.4	7.9	12.9	23.4	4.9	6.0	6.5	11.1	20.3	32.4
El Salvador	0.2	1.1	0.3	1.8	6.4	16.8	1.1	2.2	0.3	1.1	7.5	17.2
Guatemala	0.1	1.5	–0.5	0.7	14.4	16.0	0.1	1.7	–1.9	–0.3	19.2	15.9
Guyana	1.9	1.5	2.1	4.5	8.9	15.3	2.3	2.8	2.3	6.0	18.4	25.9
Haiti	3.7	1.7	10.3	3.2	22.7	15.0	4.1	1.8	6.1	10.2	27.4	12.0
Honduras	2.7	1.6	2.3	5.2	3.2	12.6	3.2	1.8	3.8	8.1	2.0	15.4
Jamaica	2.9	4.3	6.7	5.8	19.9	26.4	2.4	4.7	7.9	3.2	25.8	33.8
Mexico	1.9	3.5	3.2	6.4	16.4	32.8	1.6	3.8	1.9	6.3	18.7	35.1
Panama	[4] 1.1	1.6	1.8	5.6	6.9	16.8	[4] 1.4	1.7	2.4	4.6	9.9	22.9
Paraguay	...	1.2	5.0	9.2	12.8	25.2	...	0.3	8.6	11.1	21.6	24.8
Peru	9.4	[5] 7.8	6.8	7.2	9.5	16.8	10.5	[5] 7.1	6.9	7.4	10.1	18.8

See notes at end of table.

ANNEX TABLE 11. — ANNUAL CHANGES IN CONSUMER PRICES: ALL ITEMS AND FOOD 1960-65 AND 1965-70 AVERAGES AND 1970-71 TO 1973-74 (*concluded*)

Region and country	All items						Food					
	1960 to 1965	1965 to 1970	1970 to 1971	1971 to 1972	1972 to 1973	1973 to 1974	1960 to 1965	1965 to 1970	1970 to 1971	1971 to 1972	1972 to 1973	1973 to 1974
	Percent per year											
LATIN AMERICA (*concluded*)												
Puerto Rico	2.2	3.2	4.3	3.2	7.3	19.8	3.0	4.1	5.7	3.6	12.6	29.9
Trinidad and Tobago	2.2	3.8	3.5	9.3	14.9	22.0	2.1	3.7	4.6	11.5	19.0	30.0
Uruguay	[6] 16.2	60.0	23.9	76.5	97.0	77.2	[6] 13.1	60.0	24.5	93.8	102.8	72.4
Venezuela	[4] 1.7	1.6	2.7	3.0	4.3	8.5	[4] 1.7	0.9	2.9	5.9	9.2	14.0
FAR EAST												
Cambodia	4.3	4.5	71.4	25.4	157.9	[3] 284.8	2.7	6.7	94.4	28.4	186.4	[3] 369.4
India	6.1	[7] 8.9	3.3	6.3	16.8	28.8	6.5	[7] 9.8	1.5	6.4	21.3	30.5
Indonesia	...	100.0	4.3	6.4	31.1	40.7	...	100.0	2.6	10.4	43.4	41.3
Korea, Rep. of	15.4	12.3	13.5	11.9	3.2	24.3	18.3	12.5	18.9	3.5	2.6	27.6
Laos	38.0	6.0	1.3	25.2	30.7	49.7	39.0	4.0	0.7	34.9	40.4	51.9
Malaysia, West	0.5	[2] 0.4	1.5	2.6	10.6	17.3	0.6	[2] 0.4	1.0	3.0	15.3	26.7
Nepal	...	6.2	2.0	8.4	11.4	19.8	...	7.2	–3.5	9.0	11.7	19.6
Pakistan	2.6	5.6	4.7	8.0	22.6	29.2	3.8	6.0	5.2	10.8	28.8	30.2
Philippines	4.8	[1] 3.6	...	15.7	7.1	40.5	6.8	[1] 5.2	...	18.0	4.6	44.3
Sri Lanka	1.7	4.2	2.6	6.4	9.6	12.3	1.3	4.9	2.0	6.0	12.7	14.1
Thailand	1.5	2.5	2.0	4.0	11.7	23.3	2.0	4.2	0.6	6.4	14.4	28.5
NEAR EAST												
Cyprus	0.3	[2] 2.9	4.1	4.9	7.8	[8] 16.4	0.2	[2] 3.2	4.8	6.8	8.5	[8] 19.8
Egypt	3.2	[9] 3.2	3.1	...	4.3	10.8	6.5	[9] 6.2	5.4	...	6.7	17.0
Iran	2.0	1.4	4.1	6.5	9.8	14.0	3.1	0.9	0.7	8.6	6.8	15.9
Iraq	...	3.5	3.6	5.2	4.9	8.3	...	3.1	4.2	5.2	4.9	11.3
Jordan	...	[2] 2.8	4.2	8.2	10.5	20.0	...	[2] 5.1	6.2	11.1	18.9	34.8
Lebanon	...	[5] 1.8	1.6	4.9	6.0	11.1	...	[5] 2.0	2.6	8.7	9.7	16.7
Libyan Arab Republic	...	[1] 6.1	–2.7	–1.4	7.7	...	...	[1] 8.3	–11.1	–4.4	–9.1	...
Sudan	3.3	[1] 3.4	1.3	11.8	17.0	26.1	4.2	[1] 2.8	0.8	8.1	16.3	25.5
Syrian Arab Republic	[4] 1.3	4.2	4.9	0.8	20.0	15.4	[4] 1.3	4.7	3.8	—	22.1	15.1
Turkey	3.6	[9] 7.1	16.3	13.0	16.0	18.6	4.8	[9] 8.7	14.0	11.0	20.0	19.1
AFRICA												
Ethiopia	...	[5] 3.0	0.5	–6.1	8.9	8.7	...	[5] 3.5	–0.2	–12.0	12.9	8.6
Gabon	[4] 4.4	3.0	3.4	4.8	5.0	11.8	[4] 3.3	2.1	6.4	6.1	6.8	7.5
Ghana	11.8	3.7	2.6	14.0	11.9	27.1	14.0	2.1	2.7	17.7	19.3	30.1
Ivory Coast	2.6	4.9	–0.8	0.4	10.8	17.6	2.8	5.9	–1.8	–1.1	17.7	18.1
Kenya	2.0	1.7	1.9	...	8.2	14.9	1.9	2.0	2.4	...	4.8	17.9
Liberia	...	4.4	0.2	4.0	19.6	19.5	...	3.4	–9.2	—	30.2	26.4
Madagascar	...	2.3	5.4	6.7	6.1	22.0	...	2.2	5.3	6.2	9.3	30.0
Malawi	...	[9] 2.0	8.1	3.9	5.1	15.4	...	[9] 3.4	11.2	4.3	6.8	16.5
Mauritius	[4] 1.0	3.0	0.3	5.4	13.5	29.1	[4] 0.6	3.0	0.1	6.2	15.7	32.5
Morocco	4.0	0.6	4.1	3.7	4.5	14.4	4.6	0.1	6.3	5.1	5.4	19.7
Mozambique	[10] 1.9	3.7	15.6	7.1	5.4	21.7	[10] 0.7	4.7	13.6	14.0	–1.7	22.0
Niger	...	3.8	4.3	9.7	11.7	3.4	...	4.4	5.5	16.3	17.2	2.8
Nigeria	3.2	5.6	13.5	2.9	3.6	17.1	2.0	8.8	26.2	1.5	–2.4	20.5
Sierra Leone	[10] 3.9	4.3	–2.3	3.9	5.6	14.4	[10] 0.6	4.8	–5.7	7.5	9.0	18.6
Somalia	7.4	[5] 2.5	0.3	–2.9	6.4	17.7	7.5	[5] 2.8	–0.6	–2.4	10.6	22.5
Tanzania	1.2	[7] 3.7	3.7	9.9	5.1	24.7	1.2	[7] 2.5	5.0	10.7	5.0	28.9
Togo	...	[5] 2.1	8.9	4.3	5.0	12.5	...	[5] 2.6	10.4	7.8	2.0	11.7
Tunisia	[5] 4.5	2.9	5.7	2.2	4.4	4.4	[5] 4.8	3.1	10.3	2.4	6.6	8.2
Uganda	5.4	4.0	15.7	–3.0	24.4	67.2	7.3	3.5	24.7	–5.5	18.6	75.5
Zaire	[11] 15.6	23.0	4.9	15.1	15.7	29.6	[11] 19.0	22.0	10.5	17.6	16.6	30.8
Zambia	2.4	[7] 8.7	6.1	5.2	5.8	8.8	2.4	[7] 8.8	6.6	4.6	5.7	9.2

[1] 1965-69. — [2] 1967-70. — [3] Average January-October. — [4] 1962-65. — [5] 1966-70. — [6] 1960-62. — [7] 1965-68. — [8] January-July. — [9] 1968-70. — [10] 1961-65. — [11] 1963-65.

ANNEX TABLE 12.– MAIN FEATURES OF CURRENT DEVELOPMENT PLANS

Region and country	Currency	Duration of plan	Scope [1]	Investment		Foreign exchange component of total investment	Share of agriculture		Planned growth rate of:					
									GNP	Agricultural production		Export earnings		Employment	
				Total	Public		Total investment	Public investment		Total	Cereals	Total	Agriculture	Total	Agriculture
				Million currency units		*Percent*			*Percent per year*						
LATIN AMERICA															
Argentina	Pesos	1974-77	C	410 500	172 060	...	14.3	...	[2] 7.5	6.5	...	19.6	...	...	...
Barbados	EC $	1973-77	PS	...	176	...	...	1.7	[2] 5.0	[3] 4.0	...	7.7	...	...	...
Bolivia	Pesos	1972-77	C		...	...	...	...		...	...	...	...	...	...
Brazil	Cruzeiros	1975-79	C	716 000	...	...	...	...	10.0	7.0	...	20	...	3.5	...
Chile	Escudos	1975-80	PS		...	...	...	...		6.6	7.5	...	11.8	...	4.0
Costa Rica	Colones	1974-78	C	14 657	4 093	24.8	15.0	...	[2] 7.5	4.7	...	9.6	4.8	4.2	1.2
Cuba	Pesos	1971-75	C	...	...	...	...	...	[4] 11.1	10.0	...	...	...	...	2.1
Dominican Rep.	Pesos	1970-74	PS	...	530	...	...	...	[2] 6.6	5.6	...	12.4	...	4.5	...
Ecuador	Sucres	1973-77	C	[5] 78 922	[5] 31 743	15.7	17.6	15.4	[2] 9.9	5.3	...	8.7	3.9	3.5	2.0
El Salvador	Colones	1973-77	PS		876	47.9	...	...	6.9	5.0	...	...	...	...	...
Guatemala	Quetzales	1971-75	C	1 828	403	29.7	...	14.7	[2] 6.2	4.8	...	3.6	...	...	...
Guyana	Guy $	1972-76	C	1 150	650	...	...	...	[2] 8.5	...	...	...	...	...	...
Haiti	Gourdes	1972-76	PS	...	453	47.0	...	21.0	[2] 7.7	...	...	...	...	...	6.1
Honduras	Lempiras	1974-78	C	2 583	868	25.8	13.8	...	6.0	8.1	5.7	...	7.9	...	...
Nicaragua	Córdobas	1975-79	PS	...	...	...	...	...	2.8	6.5/7.5	...	...	...	1.7	...
Panama	Balboas	1971-75	PS	...	526	...	...	8.0	[2] 8.0	...	...	...	...	...	...
Paraguay	Guaraníes	1972-77	C	...	...	...	...	24.5	[2] 6.0	5.0	...	8.2	...	...	...
Peru	Soles	1973-74	C	...	75 500	...	...	14.8	[2] 7.6	4.5	...	...	...	6.7	4.3
Surinam	Guilders	1972-76	C	...	335	83.3	...	19.4	[2] 8.3	7.1	...	...	...	...	...
Uruguay	Pesos	1973-77	PS	...	...	...	...	...	[6] 4.0/5.0	[6] 3.8/4.6	...	10.0	...	...	1.9
Venezuela	Bolívares	1974-79	C	157 000	94 200	...	13.8	...	7.9	...	...	...	...	...	...
FAR EAST															
Bangladesh	Taka	1973-78	C	4 455	3 952	27.0	24.0	26.3	5.5	4.6	6.4	10.3	...	...	4.5
India	Rupees	1974/75-1978/79	C	47 561	31 400	5.0	14.4	12.7	5.5	4.7	4.0	7.6	...	...	...
Indonesia	Rupiahs	1974/75-1978/79	C	4 859 000	...	...	...	...	7.5	5.3	4.4	...	...	...	...
Korea, Rep. of.	Wons	1972-76	C	4 524 500	...	20.9	11.8	...	8.6	4.5	6.7	24.3	22.5	2.3	1.0
Malaysia	M $	1971-75	C	15 015	6 691	...	...	32.8	6.9	7.1	6.3	6.4	...	[7] 3.4	[7] 1.8
Nepal	Rupees	1970-75	C	2 930	2 280	65.0	32.9	26.1	4.0	...	3.0	...	...	...	...
Philippines	Pesos	1974-77	C	36 956	6 931	[8] 32.0	...	20.0	7.0	5.0	6.1	10.0	9.8	4.5	...
Sri Lanka	Rupees	1972-76	C	15 000	7 038	19.3	20.0	24.0	6.0	4.9	7.1	6.2	...	3.4	2.5
Thailand	Bahts	1971/72-1975/76	C	100 000	69 000	...	...	...	7.0	5.1	...	7.0	...	...	...
NEAR EAST															
Afghanistan	Afghanís	1973-77	C	30 930	27 700	62.9	35.0	39.0	5.0	4.2	4.6	4.6	...	...	...
Iran	Rials	[9] 1973-78	C	4 698 800	118 570	...	11.4	12.8	25.9	7.0	...	...	...	...	...
Jordan	Dinars	1973-75	C	179	100	...	15.5	23.7	[2] 8.0	6.4	...	16.0	20.0	5.9	2.6
Lebanon	L pounds	1972-77	C	7 200	1 740	...	...	22.0	7.0	5.0	...	7.3	5.5	3.4	...
Libyan Arab Rep.	Dinars	1973-75	C	2 170	1 813	...	14.4	15.9	[2] 10.4	16.0	...	5.1	...	7.0	3.8
Somalia	So shillings	1974-78	C	3 863	...	67.4	36.6	...	...	...	...	...	...	...	...
Sudan	Sd pounds	1971-75	C	370	200	...	27.9	37.2	7.6	10.0	11.4	10.6	10.6	2.0	1.6
Syrian Arab Rep.	S pounds	1971-75	C	8 000	6 450	...	31.5	39.0	8.2	5.1	...	6.5	...	4.7	2.8
Turkey	Liras	1973-77	C	291 200	...	...	12.0	...	[2] 7.9	4.6	...	9.4	3.0	...	...
Yemen Arab Rep.	Rials	1974-76	C	1 610	823	53.4	...	17.0	6.0	6.0	...	...	...	...	...
Yemen PDR	Dinars	1975-79	C	75	75	61.5	36.7	...	...	7.5	6.8	[10] 13.1	...	...	...
AFRICA															
Algeria	Dinars	1974-77	C	...	110 217	...	...	10.9	11.2	4.2	4.7	10.2	—2.8	[11] 8.3	[12] 4.7
Botswana	Rands	1973-77	C	...	...	...	...	...	[2] 5.0	...	...	...	50/60	...	...
Burundi	Rands	1973-78	C		...	...	...	...		...	...	9.4	...	...	...
Cameroon	CFA francs	1971-76	C	280 000	145 300	...	10.5	15.5	6.7	4.0	...	...	...	...	...
Ghana	Cedis	1975-80	C	...	...	...	...	...	...	...	...	...	...	...	...
Guinea	Sylis	1973-78	C	59 488	21 045	...	...	9.4	...	...	...	...	...	...	...
Ivory Coast	CFA francs	1971-75	C	505 000	210 000	...	11.0	22.0	7.7	4.1	...	6.8	3.0	5.5	4.0
Kenya	K £	1974-78	PS	...	...	...	...	...	7.4	6.7	...	7.0	...	...	...
Liberia	$	1973-78	AS		...	...	...	...		...	...	...	...	...	...
Madagascar	FMG francs	1973-77	C	169 230	104 075	30.0	23.2	31.1	3.4	3.0	...	...	...	...	...
Malawi	Kwacha	1971-80	C	...	374	29.0	...	16.3	8.0	...	...	10.0	11.0	6.0	...
Mali	CFA francs	1974-78	C		...	...	...	...		...	...	...	...	...	...
Morocco	Dirhams	1973-77	C	26 300	[13] 11 200	...	15.8	26.2	[2] 7.5	3.6	3.5	10.0	4.7	4.0	1.0
Nigeria	N £	1975-80	C		...	...	...	...		...	...	...	...	...	...
Senegal	CFA francs	1973-77	C	322 894	93 750	54.8	23.27	14.52	[2] 5.5	3.0	...	...	...	...	...
Sierra Leone	Le	1974/75-1978/79	C	...	...	48.9	15.5	26.5	[2] 6.2	4.6	4.0	8.2	5.7	2.0	1.6
Swaziland	Rands	1973-77	PS	...	...	...	...	17.0	5.0	...	...	...	...	...	...
Tanzania	T £	1975-80	C		...	...	...	...		...	...	...	...	...	...
Tunisia	Dinars	1973-76	C	1 194	707	24.3	14.9	14.5	[2] 6.6	5.8	6.4	5.3	7.1	...	...
Uganda	U shillings	1972-76	C	7 890	3 927	...	...	...	5.6	4.8	...	4.8	...	...	...
Upper Volta	CFA francs	1972-76	C		...	...	...	...	6.5	...	...	...	...	...	...
Zambia	Kwacha	1972-76	C	2 161	1 476	16	7	8	[2] 6.8	5.5	...	0.6	...	5.0	2.5

NOTE: Where possible, data refer to net investment. In many cases, however, no distinction is made in the plan, and data may refer to gross investment or may include some elements of recurrent expenditure. The agricultural sector includes animal production, fisheries, forestry, irrigation, land reclamation, community development and agricultural extension.

[1] C = comprehensive; PS = public sector; AS = agricultural sector. — [2] Gross domestic product. — [3] Excluding sugar, which is expected to grow at 6.3 % annually. — [4] Gross national product. — [5] 1972 sucre. — [6] Low and high hypotheses. — [7] West Malaysia only. — [8] Private investment only. — [9] Revised figures. — [10] Including re-exports. — [11] Non-agricultural sectors only. — [12] Increase in man-days through intensified use of labour force. — [13] Excludes investment in semipublic enterprises.

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Yugoslavia	Jugoslovenska Knjiga, Terazije 27/11, Belgrade; Cankarjeva Zalozba, P.O. Box 201-IV, Ljubljana.
Other countries	Requests from countries where sales agents have not yet been appointed may be sent to: Distribution and Sales Section, Food and Agriculture Organization of the United Nations, Via delle Terme di Caracalla, 00100 Rome, Italy.
Autres pays	Les commandes ou les demandes de renseignements émanant de pays pour lesquels des agents ou des dépositaires n'ont pas encore été désignés peuvent être adressées à: Section distribution et ventes, Organisation des Nations Unies pour l'alimentation et l'agriculture, Via delle Terme di Caracalla, 00100 Rome, Italie.
Otros países	Los pedidos procedentes de países en donde aún no han sido designados agentes distribuidores, pueden hacerse directamente a la Sección de Distribución y Venta, FAO, Via delle Terme di Caracalla, 00100 Roma, Italia.

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